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ABSTRACT

This guide is addressed to those individuals who are considering the development of a volunteer program in agencies that provide prevention of, and treatment and rehabilitation services for alcohol abuse and alcoholism. Specific steps for planning and implementing a volunteer program utilizing individual volunteers to extend and complement staff services are outlined. This sequential process of volunteer program development is presented in a three-phase model of exploration, pilot program design, and implementation. Additionally, a section on resources which identify pertinent literature and references is provided. (Author/HLM)

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volunteer program development guide

developed by
National Center for Alcohol Education

U.S. Department of Health, Education, and Welfare
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National Institute on Alcohol Abuse and Alcoholism
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1978

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The *Volunteer Program Development Guide* and its accompanying 8-hour training program, "Using Volunteers in Your Agency: Planning, Implementing, and Maintaining a Volunteer Program," is the product of a nationwide model program development effort of local, regional, and national organizations. The guide and the training program were developed by the National Center for Alcohol Education in cooperation with the Area Alcohol Education and Training Programs:

Eastern Area Alcohol Education
and Training Program
Bloomfield, Conn.

Southern Area Alcohol Education
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Atlanta, Ga.

Midwest Area Alcohol Education
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Community Addictive Treatment, Inc.
Topeka, Kans.

Alcoholism Council of California
Los Angeles, Calif.

Alcoholism Unit, Topeka State Hospital
Topeka, Kans.

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Preface

The *Volunteer Program Development Guide* is addressed to people who are considering the development of a volunteer program in agencies that provide prevention, treatment, and rehabilitation services in the field of alcohol abuse and alcoholism. The guide outlines specific steps for planning and implementing a volunteer program utilizing individual volunteers to extend and complement staff services.

Volunteer program development is a sequential process. The organization of this guide parallels the phases and steps identified in the diagram on the opposite page. A description of the essential characteristics of an effective volunteer program precedes the sections describing the development steps.

The information in the guide is addressed to the agency in which no volunteer program exists, but it will also be helpful to anyone already managing a volunteer program who wants either to improve or reevaluate established program services.

As mentioned above, the guide focuses on developing a program for individual volunteers who augment paid staff by performing regular specific tasks that extend and enrich services to clients.* (The terms "volunteer" and "unpaid staff" are used interchangeably throughout the guide.) This focus does not exclude the utilization of other categories of volunteer service:

- **direct service group volunteers** who are members of a church group, civic group, or service club and who participate either occasionally or frequently as members of that group in performing such services as arranging entertainments, repairing or redecorating the facility, or operating a canteen;
- **special service** volunteers who offer a particular skill to clients (barber or beautician, clergy, teacher) or to both clients and staff (lawyer, accountant) or to staff (public relations specialist); or
- **donors** who make cash or in-kind contributions such as food, clothing, or merchandise.

The program developed by the process detailed in the guide provides a framework in which to manage all volunteer services systematically.

It is assumed that those who use the guide will have knowledge of the basic principles of planning, administration, and supervision, and that those principles have been applied to the operation of the agency in which the volunteer program will be integrated.

The guide is not an exhaustive treatment of volunteer program development, nor is every point that is included applicable to every agency.

Issues and philosophies relating to volunteerism and volunteer programs are not discussed in the guide but are addressed in a 1-day training program, "Using Volunteers in Your Agency: Planning, Implementing, and Maintaining a Volunteer Program," which accompanies and supplements the guide. The training program is designed to assist participants in making initial plans for volunteer programs adapted to the agencies they represent.

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*Consumer can be used interchangeably with "client" by those in agencies not involved in direct alcoholism service treatment.

The guide identifies the essential characteristics of an effective volunteer program and suggests ways to plan and operate a program that manifests those characteristics. The purpose of the guide is to help agency personnel develop a volunteer program that creates and supports optimum roles for paid and unpaid staff in a productive partnership for the benefit of clients.

National Center for Alcohol Education
National Institute on Alcohol Abuse and Alcoholism

SECTION I

Introduction

The literature describing successful volunteer programs shows striking consistency in the factors identified as essential to their success. Regardless of the type or purpose of the agency (religious, political, educational, health or social services, civic), there is general agreement that certain principles must be applied in planning and operating a volunteer program.

These essential principles are reflected in the sequence of steps suggested in this guide and in the various activities and procedures relating to the completion of each step. Each principle and its implications are discussed in this section.

Principles of an Effective Volunteer Program

We're All for It

The agency is committed to the idea of a volunteer program. Commitment to the idea must go beyond a verbal or even written statement regarding the value of volunteer contributions; it must be translated into action. The agency's policymaking body must not only give its formal approval of the project, but it must also establish policies to guide planning and implementation. It must provide sufficient budget and staff time to support planning, recruitment, training, and related activities. Further, it must investigate and fulfill the legal obligations associated with a volunteer program.

The administrator must select a person with appropriate qualifications to coordinate the program and must facilitate the coordinator's task by delegating proper authority and securing the cooperation and participation of key staff. Paid staff must participate in all phases of the volunteer program and welcome the unpaid staff as part of the team.

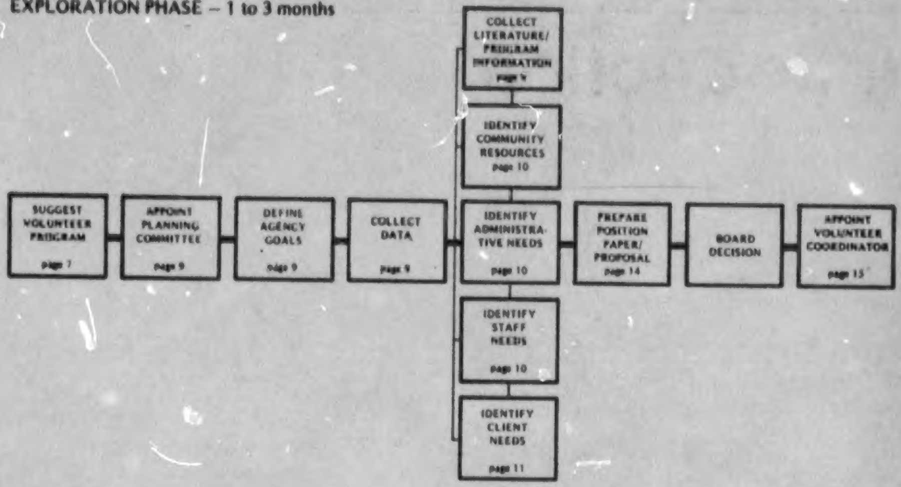
Don't Face It Alone

More than one person's time and ideas are needed to plan and implement a volunteer program. As soon as the decision has been made to explore the idea of a volunteer program, a planning committee or task force should be formed. Members should represent the board, administration, the staff, the community, perhaps former clients, and any other group that will be affected by the volunteer program. The purpose of the committee is to determine the feasibility of a volunteer program and to build commitment of agency and staff to the idea of a volunteer program.

Once the general determination has been made that a volunteer program is desirable and feasible, a volunteer coordinator can be recruited, and with the planning committee's assistance, can direct the formulation of program plans, budget allocations, and related tasks. When the program is in operation, the committee should continue to function in an advisory capacity, with additional members drawn from among the volunteers and perhaps including recovering clients if they are not represented already.

Sequence of Events for Planning a Pilot Volunteer Program

EXPLORATION PHASE – 1 to 3 months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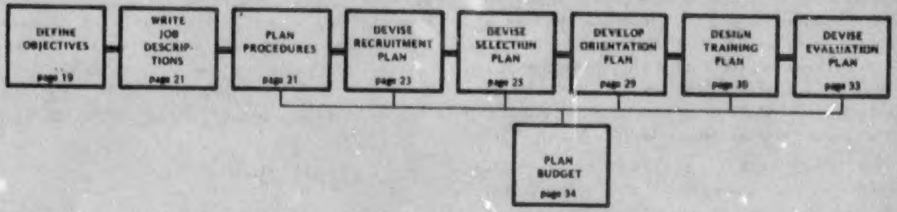
PILOT PROGRAM DESIGN PHASE – 1 to 3 months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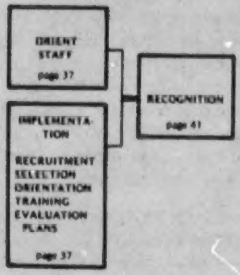
PLAN PROCEDURES page 21
DEVISE RECRUITMENT PLAN page 23
DEVISE SELECTION PLAN page 25
DEVELOP ORIENTATION PLAN page 29
DESIGN TRAINING PLAN page 30
DEVISE EVALUATION PLAN page 33
PLAN BUDGET page 34

IMPLEMENTATION PHASE – 6 to 9 months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RECRUITMENT
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ORIENTATION
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Start Small

The initial program should be a pilot program. Even with extensive, careful planning and preparation, the unexpected usually occurs when a program is implemented. Therefore, the size of the first group of volunteers to be recruited and trained should be modest; this first group, and planning for it, should be conceived as a **pilot program.**

The size of the agency will determine the size of the pilot program. In a large agency, a program may be implemented in an entire department or unit or the program may perform one function through all units, although the latter arrangement increases the amount of communication necessary to keep staff informed and prepared to work with the new volunteers. In a small agency, the pilot program may comprise only one or two volunteers.

Initial utilization of volunteers in a pilot program is somewhat like a shakedown cruise of a new ship. It is a chance to try out planned procedures and uncover and correct any problems before they affect larger numbers of volunteers.

The length of the pilot program will vary from program to program as well. Logically, it should extend through a complete cycle of events, from recruitment, orientation, and training through assignment over a period of approximately 6 to 9 months. Six months should be sufficient time for the volunteer to get to know the staff and clients and to feel comfortable in performing his or her job. It will allow time for the staff to get to know the volunteer and will be long enough to see some evidence of whether or not the program is having its intended effect.

Walk, Don't Run

Sufficient time must be allotted for planning before the first volunteer is recruited. Time is necessary to study the effect of the volunteer program on all aspects of agency services. Board members, staff members, and community representatives need time to contribute ideas about where volunteers are needed most, what they can do to meet those needs best, what skills are needed to perform particular tasks, how the agency should organize to support the volunteer program, what resources are available in the community and elsewhere to help, and what problems to anticipate and ways to avoid or minimize them.

Time is needed to specify feasible objectives for the program, to develop procedures, establish schedules, and prepare materials for recruitment, orientation and training, supervision, evaluation, and recognition. Time is needed to prepare paid staff for what they can expect from volunteers and what volunteers will expect from them.

It's not a Fifth Wheel

The volunteer program is an integral part of the total agency program. The same care and attention to detail should be devoted to the volunteer program as would be devoted to any agency program. Initiating any program development requires honest and thorough answers to these questions:

- Why was this agency created? What are we trying to do?
- How are we organized? What services do we perform to help us achieve our purposes?
- How are we doing?
- Do we need to do something in a different way? Are some new programs needed? Should we stop doing some things?
- What are some alternative ways we could go about improving our program?
- Is a volunteer program one alternative? If so, what is the volunteer program expected to do? Are its goals consistent with overall agency needs?
- If we start a volunteer program, how will it affect other agency programs in terms of budget, allocation of staff time, space, reassignment of tasks, and so forth?

They're on the Team

The volunteer is an integral part of total agency staff. If this principle is to be honored in practice, the same or similar policies for hiring, assignment, supervision, and evaluation of paid staff should be established and maintained for unpaid staff. Paid and unpaid staff opinions and suggestions should be received with equal respect. In-service training programs should be provided for all staff, paid and unpaid. Policy regarding reimbursement of job-related expenses is the same. If a volunteer is assigned a task previously performed by a paid staff member, a new job description need not be written.

Another implication of this principle is that volunteer procedures, forms, records, and other program aspects should be the same as those for paid staff. A whole new management system for the volunteer program should not be created. Instead, what already exists should be modified, only as necessary, to integrate the volunteer smoothly into the program.

It's a Two-Way Street

Volunteer incentives are critical to program success. Volunteers, by definition, are unpaid workers. Job satisfactions other than money therefore assume primary importance. Traditional forms of recognition such as awards for length of service, annual dinners, and certificates are not sufficient by themselves. A well-planned, ongoing recognition program also includes a range of other measures such as individual conferences, volunteer involvement in planning, credit for suggestions used, and assignment to a job that needs to be done.

A prime motivator of the volunteer is the quality of the volunteer program itself—its attractiveness and its challenge. Volunteer incentives range from specific modes of formal recognition to byproducts of good program management to informal personal motivators which are discussed in section IV. In short, each volunteer must be treated as a unique individual who is making a significant contribution to the work of the agency.

Take Time to Take Stock

Monitoring and evaluation are essential. Evaluation is the process of collecting and analyzing information to answer questions about how a program is operating and what effect it is having. As with any other program, evaluation of a volunteer program begins when planning begins and continues throughout the program's existence.

* * *

The **Volunteer Program Development Guide** presents in some detail a systematic and comprehensive program planning process based on the principles described above. The comprehensiveness of the guide's content and treatment may imply an orientation to a large, multifaceted alcoholism treatment agency. The guide is intended, however, as a prototype or "ideal" model for development of any volunteer program. Although each of the planning steps should be addressed or acknowledged by the agency, the scope and range of each agency's planning activities, study, and program design will depend entirely on its needs, size, type, and structure. The guide is to be considered only as a guide to individual agency planning; planning step activities should and must be modified to be relevant and appropriate to the individual agency.

References

Bashant, Susan K. *Volunteer Program Development Manual.* Denver, Colo.: State of Colorado Judicial Department, Volunteer Services Coordination Project, January 1973.

Cantor, Elizabeth M., and Margaret R. Pepper. *Guide for Staff Who Work with Volunteers.* Washington, D.C.: Social Rehabilitation Administration, 1971.

Nilsson, Gertrude L., and Barbara Carroll. *Volunteer Services: A Manual for Alcoholism Program Directors.* Washington, D.C.: National Institute on Alcohol Abuse and Alcoholism, 1977. (Available from: the National Clearinghouse for Alcohol Information.)

Scheier, Ivan H., and Judith Lake Berry. *Serving Youth as Volunteers.* Boulder, Colo: National Information Center on Volunteerism, Inc., 1972.

Exploration Phase

This section describes the steps and tasks necessary to determine the feasibility of designing and implementing a pilot volunteer program. The objectives of this phase are the collection of data to help ascertain which needs of agency administration, staff, and clients are appropriate for volunteers to meet, and the determination of both the existing and potential levels of commitment to the utilization of volunteers by agency administration and staff. An important byproduct of many of these steps, tasks, and activities will be increased staff and administrative commitment to the use of volunteers—commitment essential to the success of a volunteer program.

Exploration phase steps will also permit a planning committee's consideration and evaluation of all information collected within the framework of defined agency goals and objectives to ensure that the planned volunteer program is consistent with and becomes an integral part of existing agency structure. Analysis of that information will allow the planning committee to develop a realistic and achievable pilot volunteer program proposal, or alternative plans of action, for submission to the board of directors or other policy-making body for its decision.

The sequence of steps for exploring the feasibility of planning a pilot volunteer program is diagramed on the next page.

Suggest Volunteer Program

The initial suggestion to explore the possible use of volunteers by an agency may be made by anyone: administrator, board member, staff, client, or a member of the community.

Whoever suggests the use of volunteers should meet informally with administration and staff, both to determine their level of interest and to identify those who may want to participate further in the planning process. Those surveyed, depending on their previous experience with volunteers, may initially have to be made aware of the advantages of using volunteers and their positive impact on clients.

Results of that interest survey, if conducted by someone other than the administrator, can be presented to the chief administrator either informally or in a brief statement incorporating the advantages of volunteers in terms of enriched services. These include an improved agency-community relationship; a broader base of understanding of alcoholism as an illness; the development of informed advocates for alcoholic clients and the agency. The proposal might recommend exploring the feasibility of volunteer utilization by the agency and include a list of agency staff and supervisors whose level of interest

Sequence of Events for Planning a Pilot Volunteer Program

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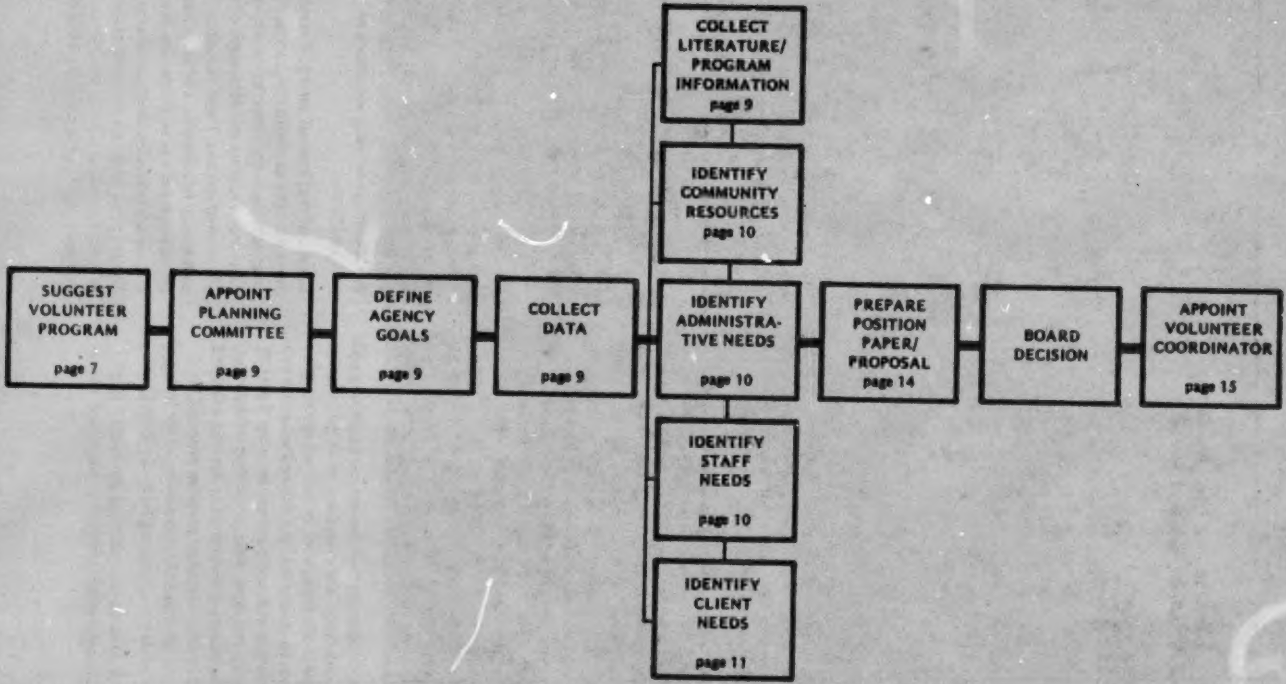
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would make them candidates for membership on a planning committee to systematically explore the feasibility of and need for a volunteer program.

Appoint Planning Committee

Once it is decided to proceed with a feasibility study, the board of directors or the administrator should appoint a planning committee. Membership should represent all groups in the agency to ensure that all interests are considered throughout the planning process.

Planning committee membership should include agency decisionmakers and board members, including the chief administrator. Without their involvement and leadership during the exploration and design phases, any proposed volunteer program will have little chance for success. Supervisory and line staff also should be represented on the committee. Efforts to achieve total staff involvement and support through consideration of their needs and ideas must begin at the earliest stages of program planning and continue throughout the agency's use of volunteers. A range of staff orientation and training activities is outlined in section IV.

Community representation should include one or two members from agencies that already operate volunteer programs. Much can be gained from the sharing of ideas, different approaches, and the mistakes of others in volunteer program development. In some cases it may be appropriate to include former clients on the committee because their interests and needs are those to which all planning is addressed. The planning group is not a "blue-ribbon panel" but a working committee, and it should continue to function in an advisory capacity after the exploration and design phases of program development. Depending on the size of the agency, the planning committee can range in size from 4 to 10 members.

The planning committee has two functions: to collect data on which to base sound recommendations on the feasibility of implementing a volunteer program and, equally as important to the success of its work, to develop and maintain agency commitment to the utilization of volunteers as an outgrowth of its own increasing commitment to and support of the idea. Securing the commitment, support, and leadership of administration and staff will be of continuing concern to the planning committee throughout the agency's use of a volunteer program.

Define Agency Goals

Essential to the principle that the successful volunteer program is an integral part of the total agency program is that both the goals and objectives of the volunteer program and the jobs the volunteers are recruited to do are consistent with the agency's overall program goals and objectives. To achieve that consistency, the planning committee, in a 2- to 4-hour work session, can reexamine the agency's present program goals and objectives in order to

- ensure that all members of the planning committee have a similar understanding of the program's philosophy and goals;
- provide the committee with a framework in which to elicit and incorporate unmet administrative, client, and staff needs; and
- enable members to articulate and write volunteer program goals and objectives that are consistent with overall agency goals.

Collect Data

This step of the exploration phase involves the collection of three kinds of data essential to making pilot program decisions: literature on the varieties and effectiveness of volunteer programs; identification of and familiarization with local community volunteer programs; and identification of needs of the agency's administration, staff, and clients.

The planning committee's search of the literature on volunteer programs and volunteerism and familiarization with community resources should begin as early as possible in the exploration phase. Its members will need "hard" information on volunteer effectiveness to begin to orient administration, staff, and clients as it meets with them individually and in small groups to explore and deal with their varying attitudes and to identify their unmet needs.

The data collection step can be completed in 1 to 3 months.

Collect Literature and Program Information

Planning committee members should collect as much information as possible on the positive impact of volunteers, the history of volunteerism, volunteer roles and activities, descriptions of volunteer programs of all types, volunteer-staff relationships, legal and insurance requirements for volunteer programs, and pertinent confidentiality and Federal income tax regulations.

References listed at the end of each section of the guide and resources in section V will serve as a starting point for this information search. Some of the important issues relating to the legal aspects of volunteer service insurance requirements and other regulations are detailed later in this section.

Identify Community Resources

In addition to the literature search, the planning committee should identify and establish liaison both with community agencies using volunteers and agencies and organizations that may be potential sources of volunteers. Committee members can schedule visits to agencies operating volunteer programs—the local chapter of the American Red Cross, State hospitals, local mental health associations, the Junior League, and the American Cancer Society, for example.

Other types of assistance are available. Some communities have central volunteer bureaus that can provide assistance with recruiting, selection, and training functions. In some communities, volunteer coordinators meet regularly to exchange experiences; attendance at those meetings by one or more committee members would be helpfor. Regional or State offices of national volunteer information bureaus or clearinghouses will be able to provide assistance. (See section V for names and addresses.) Information and assistance may also be available from other State or local alcohol program offices.

Additional sources for potential assistance and volunteer recruitment are local colleges, universities, or community colleges. Contact can initially be made with schools' public information or public relations offices. For further discussion of community agencies as sources of potential volunteers, see Recruitment in section III.

Identify Administration, Staff, and Client Needs

With documentation of the agency's goals and objectives in hand for reference and guidance and with supportive data on volunteer use and effectiveness, the planning committee can begin to survey administration, staff, and clients for needs that are not being met by existing programs and services.

In initial communications with staff and administrators, the planning committee will recognize and should be prepared to deal with several common attitudes about volunteers based on a number of misconceptions and lack of information about the positive impact of volunteers on client service. Those attitudes are expressed as vocal opposition to volunteers; superficial, "lip-service" support of volunteers; and the overenthusiastic belief that volunteers can do anything, without training or agency support.

If there is opposition to the use of volunteers, the following measures may be used to orient agency staff before and concurrently with the data collection tasks outlined above.

- Provide data on the impact of volunteers in alcohol treatment agencies and other types of programs, and positive endorsements of the use of volunteers by State alcohol agencies or other State or Federal programs.
- Encourage staff visits to volunteer programs in the area or set up appointments for visits from supervisors, staff, or volunteers from those agencies.
- Encourage participation in conferences, workshops, and seminars on volunteer management to establish staff contact with professionals who are enthusiastic about the use of volunteers as program enrichers.
- Ensure staff involvement and participation in all volunteer program planning, in needs identification, and in job development exercises.

With those who are superficially supportive or overenthusiastic about volunteers, the job of the planning committee is not to "sell" the volunteer program but to build awareness of the specific kinds of involvement and decisions that will be required of both administration and staff if the proposed volunteer program is to be even moderately successful. Administrators will have to make specific policy, program, and personnel decisions as they relate to the use of volunteers; staff will be required to make specific supervisory judgments and assist in varying ways with the development of volunteer job descriptions, recruiting, screening, orientation, training, and evaluation.

Administrative Needs. Informal conversations with the agency administrator and board members in the context of exploring the agency's potential utilization of volunteers may elicit areas of administrative need that could be met by volunteers. Administrators and board members may be thinking in terms of fundraising, public relations, committee work, legal assistance, business operations, accounting, or in terms of improving and extending the capabilities of the board itself.

Volunteers can be recruited to serve as board members to enhance the board's responsiveness and effectiveness in specific areas of policymaking as well as be recruited to meet special administrative needs such as legal counseling or accounting. Literature detailing the effectiveness of volunteers as members of policy-making boards and in administrative functions are listed in section V. Administrative needs can be evaluated in relation to staff and client needs in the development of pilot program volunteer functions.

Staff Needs. Staff will be thinking in terms of the responsibilities for which they have trouble finding time and in terms of additional services they would like to implement to enrich agency programs.

Identification of staff needs can be accomplished in a number of ways depending on the size and structure of the agency—from individual private conversations to small group "rap" sessions of from 5 to 10 staff members.

In these rap sessions, the planning committee can guide staff through a procedure that will produce potential volunteer jobs from staff needs based on an analysis of their own job activities. One such strategy is the "jobs we're doing" and "jobs we're not doing" procedure.

1. Each staff member lists all of the job activities performed in the last 3 days, preferably in the order of their frequency. Staff may list up to 25 or 30 specific items such as answering the phone, driving clients to hospitals, arranging client appointments in other agencies, and home visits.
2. Each staff member then lists all of the jobs he or she would like to do for clients—services for which there is rarely or never enough time.
3. Activities on each of the lists are potential jobs for volunteers.
4. Discuss each listed activity with the staff to determine whether or not
   - the job has genuine significance;
   - the job enriches or improves service to the client;
   - having a volunteer do the job would relieve staff of nonprofessional or lower priority but necessary duties;
   - the activity would augment professional-level services;
   - the job is appropriate for volunteers to perform;
   - the job would be satisfying to a volunteer; and
   - staff would like to consider having a volunteer do the job.

From the resultant list of staff needs that are potential volunteer jobs, the planning committee can begin to make some initial determinations about the scope and focus of the pilot volunteer program in terms of agency goals, objectives, and priorities in preparation for assessing potential jobs in relationship to client needs.

Client Needs. Clients will be thinking in terms of finding or changing jobs, finding homes, arranging for family needs, becoming involved in social or recreational activities, acquiring suitable clothing, and getting financial assistance.

Because client needs are the basis for all program planning and services, it is important to develop strategies for determining whether any of these needs are not being met. One such strategy might be to submit the list of staff needs that are potential volunteer jobs to recovering or graduate clients, individually or in small groups, for their reactions and comments on the value to them of the various services these jobs represent.

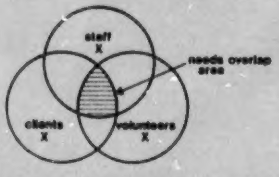
Depending on the individual client's stage of recovery, he or she may be asked what needs exist that are not being addressed but are essential to recovery, and what future needs are anticipated for which no services are available.

Clients' responses to the staff's list of potential volunteer services, as well as their additional needs assessments, can be evaluated by the planning committee in relation to staff needs. One or two (or more) common needs can be selected for the pilot volunteer program.

Needs Overlap Analysis in the Helping Process

Ivan H. Scheier of the National Information Center on Volunteerism has developed a method called "Needs Overlap Analysis in the Helping Process" (NOAH) to arrive at a consensus of need for developing volunteer jobs.* A people-oriented, rather than a job-oriented, approach, NOAH seeks areas of overlap in the needs of all three groups of people involved in the volunteer program—staff, clients, and volunteers. It is a communications process involving negotiation among all three groups within the specific realities of client and staff needs and volunteer needs and abilities.

The nonoverlap areas, marked with an X, represent staff ideas for volunteer jobs that volunteers don't want to do, jobs volunteers want to do that staff consider inappropriate, and client needs for services that neither staff nor volunteers consider appropriate. The shaded area represents common needs and ideas of all three groups and are those from which volunteer jobs are created.



Because this is a recently developed strategy that has been successfully employed in only a relatively small number and variety of agency settings, it is recommended that the specifics of the process be more fully explored before using it in an alcohol treatment agency. The process should be facilitated by an individual highly skilled and experienced in group process.

For information on acquiring publications describing the NOAH process, see section V.

Examine Legal Responsibilities

An agency exploring the feasibility of a volunteer program should conduct a thorough examination of the legal considerations relating to liability and to confidentiality.

Laws regulating liability vary from State to State; liability insurance requirements and coverage also vary. Agency policies and decisions in these matters should be made only after consultation with lawyers and insurance

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*Ivan H. Scheier, et al. *People Approach Systems of Volunteer Involvement: NOAH and MINIMAX*, Frontier Paper 13. Boulder, Colo.: The National Information Center on Volunteerism, Inc., August 1974, pp. 3-8.

specialists who know the agency and the jurisdiction in which it operates. The following information is provided only to identify general issues.

Liability. Everyone is familiar with the requirement that automobile drivers carry insurance to cover payment of damages for injury to persons or property that may result from improper operation of the vehicle. In legal terms, a civil wrong such as improper handling of a motor vehicle that results in injury is called a tort.

The possibility of a civil wrong has implications for the agency that establishes and conducts a volunteer program. These implications may be expressed as the possibility of

- liability of the agency to outside parties, including clients, for acts of volunteers;
- liability of volunteer programs or agencies operating such programs to volunteers who may be injured in the course of their work; and
- liability of volunteers themselves to outside parties for injury or damage resulting from their actions in the course of volunteer work.

Issues of liability are distinct from issues of malpractice, which pertain to occupations having licensing requirements and standards of practice such as medicine, dentistry, and the law. These requirements and standards apply whether the person practices his or her profession as paid staff or as a volunteer. In other words, if an agency uses professionals in a volunteer capacity, these individuals must be properly licensed and observe usual standards of performance; otherwise, in the event of client injury, they may be charged with malpractice.

Potential liability is of concern to both the agency and the volunteer. Many States have enacted laws relating to the liability of organizations and individual citizens. In cases in which the law does not cover all potential liability situations, insurance may be available to cover the damages one must pay if declared liable.

Whether insurance is necessary is another matter. According to Gurfein and Streff in *Liability in Correctional Volunteer Programs*, "Present case law shows few cases where a volunteer caused an agency to be liable because of an act done by the volunteer."[1] The authors continue:

> Careful planning in all stages of volunteer program operation should include adequate training and supervision of volunteers. Experience indicates that where the volunteer has been properly trained and received adequate supervision, liability situations rarely occur.

Legislation relating to liability and insurance protection varies from State to State. Within a given State, the legislation differs for each of the three types of liability relationships described above. Any agency planning a volunteer program should have its legal counsel contact the State attorney general's office to determine the status of relevant law in that State.

Specific policies regarding potential liability and insurance in volunteer programs vary according to the size, type, and location of the agency and functions of volunteers, but some general statements can be considered in planning any volunteer program.

- The question of liability and insurability in volunteer programs stems from the unpaid status of volunteers. If the State legislative definition of employee covers unpaid workers, then the requirements the agency observes for paid staff apply equally to unpaid staff.
- More and more States are enacting or considering legislation to include volunteers working in State agencies (such as courts), as employees—thus extending an agency's public liability insurance to the acts of volunteers.
- If an agency did not have public liability insurance before instituting a volunteer program, it is possible to obtain it, and experts in the field strongly recommend that this be done. The extent of coverage and the cost can only be determined in consultation with a local underwriter.
- If an agency determines the need to purchase general accident insurance to cover volunteers, Volunteers Insurance Service Association, a nonprofit organization, can provide up-to-date insurance information to its members. (See section V for address.)
- Public liability insurance does not usually include automobile liability. If a volunteer assignment includes use of a personal automobile, the agency should ascertain at the time of application that the individual has a valid, up-to-date driver's license and at least the minimum required liability insurance. Additional auto liability and/or comprehensive personal liability insurance may be purchased by the agency.
- Regardless of what decisions an agency makes about protecting itself, the client, and paid and unpaid staff, the conditions under which the volunteer program is operating should be made clear so that all may be advised of the coverage provided and its limitations.
- Everyone involved must understand that insurance does not obviate the need for good judgment and due care. No insurance will protect against gross negligence or willful misconduct.

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[1] Peter J. Gurfein and Trisha Streff, *Liability in Correctional Volunteer Programs: Planning for Potential Problems.* Washington, D.C.: American Bar Association Commission on Correctional Facilities and Services, 1975.

Confidentiality. Alcohol programs have always taken great care to preserve confidentiality in all matters relating to the clients they serve. Federal regulations now guide the confidentiality of clients' records. These regulations are detailed in "Confidentiality of Alcohol and Drug Abuse Patient Records: General Provisions" (*Federal Register*, August 1, 1975, Volume 40, Number 127), and may be obtained from the National Institute on Drug Abuse Clearinghouse, 11400 Rockville Pike, Rockville, Md. 20852, or Superintendent of Documents, U.S. Government Printing Office, 710 North Capitol Street, Washington, D.C. 20402.

The regulations apply to all alcohol and drug abuse programs funded, conducted, or regulated by any department or office in the Federal Government (except interchanges within the Armed Forces, including the Veterans Administration). The regulations also apply to programs funded by State agencies and those agencies classified by the Internal Revenue Service as charitable or tax-exempt.

Any client information, recorded or not, received or acquired in connection with the program is considered confidential and may not be released without client consent. Confidential information includes records of a client's identity, diagnosis, prognosis, and treatment and information on a client's progress, attendance, and whereabouts.

Provisions of the statute specify which information can be released, to whom, for what purposes, under what circumstances, and for how long. Also covered are special situations concerning instances when client consent cannot be obtained, as are minors and court referrals.

The implications of the new confidentiality regulations for an agency with a volunteer program are several. First, the agency will want to review its existing policies on confidentiality and make modifications, if necessary, to ensure compliance with the new regulations. Changes in policy may require changes in agency procedures and forms.

Next, staff members must be apprised of the new regulations, the resulting policy changes, and the penalty for violation (up to $500 for the first offense; up to $5,000 for each subsequent offense). If a volunteer program is already established in the agency, both paid and unpaid staff members should be included in any information or training program about the new regulations and the resulting changes in agency policies and procedures.

If a volunteer program is being contemplated, the matter of confidentiality and the volunteer's responsibilities in this regard must be included in volunteer training. This applies to all volunteers, whether or not they have direct access to client records. The new regulations specify that confidential information may be both recorded and unrecorded. Sessions on confidentiality should include presentation of situations in which the volunteer may face this issue, guidelines as to what to say or do, and practice in applying the guidelines.

The existence of the new regulations should not deter agencies from using volunteers in any capacity for which they are qualified and trained. Volunteers demonstrated, long before guidelines on maintaining confidentiality were expressed in legal terms, that they could understand its importance and perform accordingly. This is especially true if the need for confidentiality is made explicit through training, if observance of confidentiality is included in a list of written expectations, and if paid staff set a good example.

IRS Regulations for Tax Deductions

Volunteers with limited means may be deterred from accepting or continuing an assignment if expenses are incurred in the process of meeting the associated commitments. If the sponsoring agency is not able to reimburse the volunteer for these expenses, the situation may be eased somewhat by providing information about what expenses are tax deductible. Even volunteers who can afford to absorb these costs will appreciate knowing of the option.

Internal Revenue Service Publication No. 526, "Income Tax Deductions for Contributions," contains the regulations governing the deductibility of expenses incurred in performance of charitable volunteer activity. Every local IRS office can supply copies of this publication and the local IRS Office of Taxpayer Assistance can answer specific questions regarding the regulations. In areas where a local IRS office is not conveniently accessible, a call to the toll-free IRS number listed in all telephone directories will yield the information.

Briefly stated, the regulations are as follows:

- **The cost of transportation** from a volunteer's home to where he or she serves is deductible.
- **Reasonable costs for meals and lodging,** if a volunteer is away from home while donating service to a qualified organization, are deductible. Personal expenses for sightseeing and entertainment, and for travel, meals, and lodging expenses for an accompanying family member are *not* deductible.
- **The cost of attending a religious convention** as a duly chosen representative of one's church or synagogue is deductible.
- **The cost and upkeep of uniforms** that have no general utility and are required to be worn while performing donated services are deductible.
- **Unreimbursed expenses** directly connected with and solely attributable to voluntary service performed for one's church or synagogue are deductible.

- **Use of personal automobile**—Volunteers may deduct out-of-pocket expenses for gas and oil that are used for services rendered to a charitable or tax-exempt organization. If a volunteer does not wish to deduct gas and oil expenses, he or she may use a standard rate of 7 cents per mile to determine the contribution. Under this method, parking fees and tolls are deductible in addition to the 7 cents per mile. However, the costs of auto insurance and normal depreciation *are not deductible*, nor is a pro rata portion of the general repair and maintenance cost of a volunteer's automobile that is used occasionally for volunteer work.
- **Per diem allowance**—If a volunteer performs a gratuitous service for a charitable organization and receives a per diem allowance to cover reasonable travel expenses, including meals and lodging, while away from home in the performance of such duties, the allowance is regarded as income to the extent it exceeds actual travel expenses. Travel expenses to the extent they exceed the allowance are deductible.

Specific data collection tasks related to IRS regulations include the following:

- Obtain Publication No. 526 from the local IRS office (See local telephone directory.)
- Obtain similar publications on information for State and local tax jurisdictions. (See telephone directory for office addresses.)
- Verify the status of your agency in terms of the definition of a charitable organization.
- Project what expenses will or might be associated with the volunteer assignments that have been specified.
- Determine what expenses the agency can and cannot reimburse.
- Prepare relevant guidelines for prospective volunteers.

Assistance in interpreting the regulations and their implications for the agency and its volunteers may be obtained from a board member who is experienced or trained in tax matters.

A number of bills have been introduced in Congress that would, if passed, extend the range and type of expenses incurred in connection with volunteer service that are deductible. Considerable debate surrounds the measures that these bills propose. One way to keep abreast of the progress of these bills and the issues involved is to subscribe to *Voluntary Action Leadership*, distributed free nationally and published four times a year by the Local Affairs Department of the National Center for Voluntary Action, 1785 Massachusetts Avenue, N.W., Washington, D.C. 20036.

Prepare Volunteer Program Proposal/Position Paper

In one or a series of meetings, the planning committee can evaluate and synthesize all of the data collected during the exploration phase. The committee should consider the needs of clients, staff, and administration; the level of staff support and receptive staff; the available local resources and level of community commitment; and positive impact data on the effectiveness of volunteers. It should analyze descriptions of successful volunteer programs of all types; information on insurance liability, confidentiality, and tax deducation regulations; and, most important, the level of administrative support.

Following an analysis of all available data, the planning committee should be able to make one of the following determinations:

- that a higher level of commitment by administrators and staff is needed to ensure the success of a pilot program, and what additional activities should be planned to increase that level;
- that data collected are insufficient for making sound, realistic recommendations to the board of directors, and what additional information is needed;
- that no further action should be taken because of lack of commitment and/or need; or
- that definite needs exist, that there is a high level of commitment to the use of volunteers, and that the likelihood of designing and implementing a successful program is great.

If the planning committee decides to proceed, a program proposal for the board's review (or a less formal planning document) should be developed and should include the following components or determinations:

- a brief statement of purpose of the proposed pilot volunteer program;
- a description of the size and scope of the projected total volunteer program;
- a statement of the level of support of the administration, staff and community;
- a description of the proposed pilot program, including selection of the agency unit in which to establish the pilot; one or two (or more) priorities for volunteer jobs based on consensus of needs of clients and staff; types of volunteer services required (see preface); number of vol-

unteers required for the projected program; probable orientation and training needs of volunteers; office space and other facilities required; budget for program design and implementation; and a draft of the job description of a volunteer coordinator, including whether the position will be paid or unpaid, part time or full time.

Planning Committee Checklist

A prototype checklist of the specific kinds of commitment required of the agency administration has been developed for use by the planning committee—and later the volunteer program coordinator—in evaluating the extent of support for volunteer program development. (See appendix B, pp. 62 and 63.) The checklist can be used either in questionnaire or interview form and can be adapted to fit individual agency needs.

Because of the extent of agency commitment suggested by the checklist, this or a similar instrument is most appropriately used by the planning committee toward the end of the exploration phase.

Conclusions drawn from it can form the basis for a position paper on the agency's potential use of volunteers or a proposal for a pilot volunteer program. If responses to one-half to two-third of the questions on the checklist are negative or ambivalent, the advisability of beginning a volunteer program should be seriously questioned. Variations of the checklist can also be used as an evaluation tool at later stages of program planning and development.

Appoint Volunteer Coordinator

Following the decision by the board of directors to proceed with the design of a pilot volunteer program, the volunteer coordinator should be selected by the agency administrator with the assistance of the board, staff, and planning committee.

The common functions necessary to run a volunteer program give some indication of the qualifications needed by a volunteer coordinator. Depending upon the size and age of the program and the resources of the agency, the coordinator may be responsible for all of these functions.

- **Administration**: Program policy and direction; staff selection, policy, and supervision; cash and in-kind funding; public relations; and accountability to board.
- **Coordination and training**: Interviewing and assigning volunteers; inservice training for volunteers and staff; coordination of volunteer-staff relationships.
- **Program and community resources**: Development and maintenance of program and community activity resources, e.g., free tickets to sporting and cultural events, free services such as income tax assistance, and sources for donations to the program, such as books, recreational equipment, and toilet articles.
- **Fiscal management**: Maintenance of financial and program statistics, purchasing, budget preparation and projection, and monitoring program efficiency.
- **Recruitment**: Recruitment of volunteers and clients through presentations, personal contacts, or mass media.
- **Literature and graphics**: Development and production of program materials, e.g., brochures, newsletters, slide presentations, and forms.
- **Support**: Supervising volunteer-related support tasks of receptionist and secretary.

Beyond the range and level of skills, experience, and personal qualifications required to fill this position, consideration should be given to selecting a person who

- knows the people, the organizations, and the resources of the community in which the agency is located;
- knows the program, policies, and staff members of the agency which the volunteer program will serve; and
- has had experience as a volunteer.

Also critical to the success of the program is the position of the volunteer coordinator in the organization of the agency. Depending on the size and type of agency, it is imperative that the coordinator, whether volunteer or paid staff, report to the director or to a unit chief. The following is a sample job description for this position: The volunteer coordinator shall be responsible to the agency director for developing, directing, and coordinating all phases of the volunteer service program, including

- providing liaison on all matters relating to volunteers between the agency and the community, the agency and the State program director, the agency and other alcoholism services, the agency and the volunteer;
- orienting clients, staff, and board to the volunteer program;
- determining from clients, staff, and board the agency's need for volunteers in terms of service and contributions, and the number of service volunteers it has the physical capacity to absorb;
- preparing the structure for the volunteer program: application forms, time records, evalua-

tion forms, interview guides, contracts, and so on;

- maintaining records and files of volunteer program;
- preparing materials for and directing the operation of the recruitment campaign: mailings, speakers for organizations, publicity, interviews, selection, etc.;
- with committee assistance, planning, scheduling, and implementing educational and training programs for volunteers;
- assigning volunteers and arranging for supervision;
- evaluating service volunteers, both individuals and groups, and revising assignments as indicated;
- submitting reports as needed on volunteer program; and
- planning and implementing systematic steps for the development of leadership capabilities among volunteers, including a variety of task assignments and support and encouragement to assume increasing responsibility.

For other sample job descriptions for this position, see appendix A.

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Pilot Program Design Phase

This section covers the steps and tasks to be accomplished in planning a pilot program. A pilot program is a small-scale prototype of the complete volunteer program an agency may establish over a period of 2 to 3 years. The complete volunteer program, in general terms, is described in the position paper prepared by the planning committee during the exploration phase.

Part of the board decision to establish a volunteer program in the agency includes designation of a segment of the complete program as the first to be established. This strategy permits the agency to plan and try out in microcosm all of the components necessary for an effective volunteer program, to test on a small scale the policies and procedures that form its structure. This experience is the basis for revising those policies and procedures prior to implementation of the volunteer program on a larger scale. The pilot program also serves to demonstrate the value of unpaid staff to paid staff who are not yet committed to the volunteer program.

The diagram on the following page displays in sequence the steps that constitute the pilot program design phase.

Define Objectives

The first step in planning a specific volunteer program is to establish the objective(s) for the program. The objective(s) should be as specific as possible to provide a sufficient basis for designing the program components: job descriptions, recruiting, training, and supervision. Also, carefully stated objectives make the evaluation task much easier.

A clear objective is one that can be interpreted in the same way by two people. To qualify, it must

- state the result to be accomplished;
- state the result in measurable or observable terms; and
- specify when the result will occur.

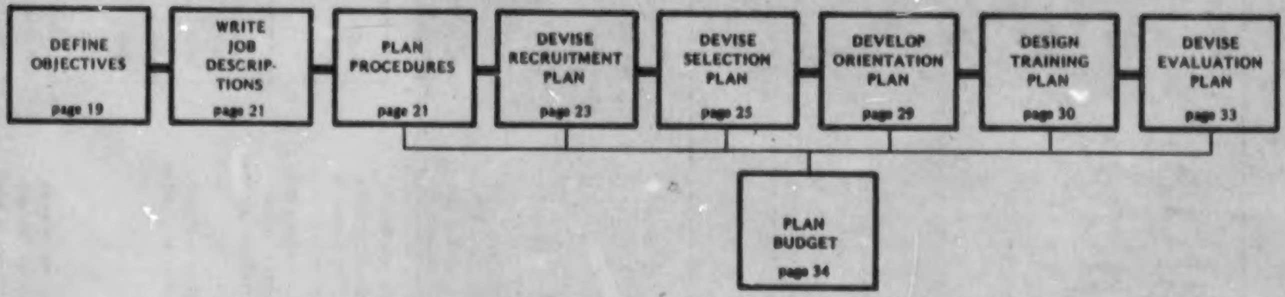
For example,

result	A program of recreational activities such as arts, crafts, music, and sports will be established for inpatients,
measurable terms	offering at least hour-long sessions in six different activities over three evenings each week,
when	to be in full operation in 6 months

No matter how clearly the objective is stated it will not be useful unless these questions can be answered affirmatively:

- Is it consistent with agency goals and other program objectives?

PILOT PROGRAM DESIGN PHASE – 1 to 3 months


DEFINE OBJECTIVES
page 19
WRITE JOB DESCRIPTIONS
page 21
PLAN PROCEDURES
page 21
DEVISE RECRUITMENT PLAN
page 23
DEVISE SELECTION PLAN
page 25
DEVELOP ORIENTATION PLAN
page 29
DESIGN TRAINING PLAN
page 30
DEVISE EVALUATION PLAN
page 33
PLAN BUDGET
page 34

- Is it consistent with staff needs?
- Is it consistent with client needs?
- Is it feasible in terms of time, facilities, and human and financial resources?

Write Job Descriptions

During the exploration phase, the question of what volunteers might do was expressed broadly in terms of client, staff, and administrative needs. In the design of the pilot program, the question becomes "What will the volunteers do?" The answer is derived from the objectives of the pilot program, is expressed in terms of volunteer duties and responsibilities, and is contained in a job description.

It is important to emphasize here that if the activity is one formerly assigned to a paid staff member and a job description already exists, then a new job description need not be written. Some adaptation may be necessary, however, particularly regarding the time requirements. A completely new job description will have to be written only if none now exists.

How the Job Description is Used

An accurate and complete job description is important for a number of reasons. First, it gives to the volunteer a sense of staff commitment and program solidarity. The existence of the job description shows that thoughtful planning has been done and that the volunteer activity is indeed considered an integral part of the agency program. The job description facilitates communication and expedites the volunteer's integration into the program because staff, clients, and volunteers all know what to expect.

The job description guides recruitment by giving potential volunteers a basis for deciding whether or not a particular job matches their interests and abilities. The job description guides selection by serving as a basis for determining the content of the interview, establishing selection criteria, and appropriately matching the volunteer and the job.

Who Prepares the Job Description

The volunteer coordinator and the staff with whom the volunteers will be working should collaborate on this task of adapting an existing job description or preparing a new one. The staff members know the context in which the volunteer will be working, are thoroughly familiar with what the volunteer will be expected to do, and can describe the qualifications that the volunteer should have. The volunteer coordinator must fully understand the nature of the job to recruit suitable volunteers and be able to ensure that the job description is clear and complete.

What the Job Description Contains

Minimally, a job description should include:

- what the volunteer will do,
- who the volunteer reports to,
- the number of hours required,
- the length of commitment expected, and
- the qualifications and/or skills required or desirable.

Other information that should be provided, although not necessarily as part of the job description, includes:

- the goals of the program in which the volunteer is working,
- where the volunteer will be working, and
- guidelines for volunteer behavior.

Sample job descriptions from a variety of agencies are included in appendix B.

Plan Procedures

Having determined where unpaid staff will be working and what they will be doing, procedures can be planned that will ensure the volunteers' smooth introduction and integration into the agency's operations. Not only does this preparation make the unpaid staff member feel more at ease more quickly, it reduces the number of needless questions that disrupt the normal flow of activities and on-the-spot decisions that create confusion.

Areas to attend to in establishing procedures are supervision, recordkeeping, scheduling, space allocation, and clerical assistance. The volunteer coordinator, working with administrative and staff representatives, is responsible for making appropriate arrangements. Further, the volunteer coordinator sees that decisions and procedures are documented and distributed.

Supervision

As a general principle, unpaid staff are supervised by the paid staff member who supervises other paid staff in the same unit or activity. Specific procedural items to be determined are

- who the volunteer reports to and where,
- who is responsible for appraisal conferences,
- how frequently these are held,
- instructions to the volunteer about reporting illness,

- guidelines for handling problems, and
- termination policies.

Matters that pertain primarily to the volunteer program itself will be handled by the volunteer coordinator. These include

- maintaining records;
- facilitating communication among all staff;
- counseling individual volunteers; and
- meeting regularly with volunteers to monitor program progress, elicit suggestions, and anticipate problems.

Recordkeeping

Good records are essential to an effective volunteer program in order to monitor program operation, provide a record for recognition of volunteer service, and form the foundation for program evaluation. As with procedures, the same principle applies: To the extent possible, use the forms developed for paid staff. Beyond this, new records may need to be developed to record data unique to the program and necessary to determine achievement of program objectives.

General Documentation. Assuming that the experience gained in the pilot program will lay the groundwork for improving and extending the program, it will be helpful to maintain a file of all materials that are produced and used for all phases of the program. Examples of what this file might include are

- materials and resources collected during the exploration phase;
- the position paper;
- copies of letters and memos, both internal and external;
- content of presentations made to community groups;
- the pilot program design; and
- all materials used for recruitment, orientation, training, reporting, and evaluation.

The materials contained in this file will serve as a record of the development of the volunteer program, a source of information for ongoing and periodic evaluation, and the bases for more extensive program documents, such as a volunteer handbook for recruitment and orientation purposes and staff and volunteer training and evaluation models.

Individual Records. Policies regarding maintenance and storage of records will vary from agency to agency. If it is customary to compile and store employee records in a folder, volunteer records should be handled in a similar fashion. For convenience, volunteers' records may be located in the volunteer coordinator's office and maintained under his or her supervision. The volunteer file becomes a history of an individual's service to the agency. Documents contained in the file may include

- application form,
- references,
- letter of agreement,
- notes on recruitment and evaluation interviews,
- written performance appraisals,
- training programs attended, and
- activity reports submitted by volunteers.

The content and use of these documents are discussed more fully below, under Recruitment and Selection. Sample documents are in appendix B.

Program records. Information collected on the volunteer program itself will vary according to the objectives of the program, but at a minimum the records should reflect the resources that went into the program and indicators of possible benefits. For example:

- number of volunteer hours,
- staff time invested,
- program expenses, and
- number of clients served.

Summary Data. A third type of recordkeeping is data that summarize on a quarterly basis, the number of volunteers in the program, the number trained, the number waiting for assignment, and the number who dropped out. To evaluate recruiting methods, it is advisable to keep track of the number who apply and how they heard about the program. A sample summary data form is included in appendix B.

Scheduling

A schedule is an essential planning and communication tool for both the agency and the volunteers. Paid staff must know ahead of time who will be available, when, and what they will be doing. Unpaid staff need to know when they are expected, for what purpose, and for how long.

The scheduling process actually begins when the agency identifies the functions that volunteers will perform. The program objectives and job descriptions further define the time requirements. If the requirements are fixed, unpaid staff are recruited whose availability coincides with the agency needs. If the time requirements are flexible, the volunteer coordinator and the unpaid staff members can plan mutually agreeable schedules.

Frequency. The longer the period for which a schedule can be established, the easier the job of planning and communicating expectations to paid and unpaid staff and to administration. Supervisors can plan paid staff assignments and client activities, and unpaid staff can arrange personal affairs to ensure their regular attendance.

Accuracy. Once the schedule has been established, it will remain useful only so long as it is kept up-to-date. It is recommended that a check be made with paid and unpaid staff at appropriate intervals to determine whether the schedule is accurate. One person should be designated to receive all schedule changes and see that they are communicated to all concerned.

Posting. Schedules should be posted in areas frequented by paid and unpaid staff and all others concerned with the volunteer program. The schedule locations should remain constant as nearly as possible so that all staff can depend on finding the information routinely.

Space

Assignment of office or workspace for unpaid staff establishes a sense of integration and continuity, just as does the selection of a customary and convenient place or places to post the schedule.

The volunteer coordinator's office or desk can serve as a central location for messages and information. Consideration should also be given to questions such as:

- Where will unpaid staff park their cars?
- Where will they hang their coats?
- Do they need desks or other special workspace?
- Is there an adequate supply of materials for them to do their assigned tasks?
- Where will special materials or equipment be stored?

Clerical Assistance

When the board of directors approved the utilization of unpaid staff, provision was made for the clerical support needed to plan the pilot project. At this point, it is necessary to consider what level of clerical support will be needed when the pilot project is implemented.

Factors to consider include

- the number of volunteers;
- recruitment, training, orientation, and other materials that will be produced;
- assignment of record-keeping and scheduling tasks; and
- nature of volunteer assignments.

If clerical assistance is needed only for specified intermittent periods rather than on a continuing basis, this function might be designated for an unpaid staff member.

Devise Recruitment Plan

Most manuals on establishing volunteer programs cite a deluge, rather than a dearth, of volunteers as a major problem in volunteer recruitment. Unless a recruitment plan has been created and tailored to the needs of the specific volunteer program, there may be many disappointed, unplaced, or poorly placed volunteers. The reputation of the agency and the volunteer program will suffer from reports of disgruntled volunteer applicants. Therefore, a recruitment plan and appropriate supporting materials are needed for locating the kind and number of persons most likely to fit the volunteer job descriptions and openings. In addition, the timing of recruitment implementation is crucial: **Recruitment should not begin until the entire pilot program design phase has been completed and the implementation phase launched.**

A recruitment plan should be developed that will specify

- the job description(s) and number of openings for which volunteers are needed in the pilot program,
- appropriate places to recruit for the specific jobs,
- appropriate strategies for locating prospective volunteers for those openings, and
- the tools that are needed for the recruitment effort.

Job descriptions were discussed above. The remainder of this section will discuss places, strategies, and tools for recruiting volunteers.

Where to Recruit

The job description itself will give the clearest indication of the most likely source of volunteers. For example, if a program need is the preparation of a monthly newsletter, a good source for a volunteer would be the communications or journalism department of a local college. A student or team of students could produce the newsletter as an extension of classroom activities, perhaps monitored by their professor. A built-in incentive would exist for volunteer followthrough on the project, at least for the duration of the school year. Another possible recruitment source might be the local chapter of Retired Senior Volunteer Program (RSVP) whose members may well include former editors or writers who would greatly enjoy putting their skills to work again.

Another example could be a job description for 10 volunteers to alternate or be on call as escorts or companions for clients who would like to go shopping, out to a movie, or on a similar outing. These volunteers would not need special qualifications, except perhaps a driver's license, but an empathetic understanding of the client would be highly desirable. Graduate clients or members of local Alcoholics Anonymous (A.A.) or Al-Anon fellowships might be the most fertile recruiting ground in this instance.

The following "people power" sources are uniquely valuable to an alcohol-related volunteer program:

- **Graduate clients.** Volunteer work may be a means to use leisure hours constructively as an aid to recovery or in maintaining renewed interest in living fully.
- **Families of graduates and clients.** In a volunteer role and through volunteer orientation and training, these people will come to a better understanding of their own family members; thus motivation for volunteering is built in.
- **Friends of staff and volunteers.** The skills and interests of the prospective volunteers will probably be known to the staff and volunteers. This will aid in recruitment for specific volunteer jobs.
- **The Council on Alcoholism.** A nationwide volunteer program itself, the Council on Alcoholism's local chapter is likely to have members who can aid in several ways; for example, by providing faculty for the volunteer training program.
- **A.A., Al-Anon, and Alateen members.** These are natural sources, as the veteran in the alcohol field knows. For the volunteer coordinator who is new to the field, it is important to become familiar with the traditions of these programs and to establish rapport with the fellowships. A word of caution: Fellowship members who apply to be volunteers do so as private individuals. Never identify a volunteer (or anyone else, for that matter) as a fellowship member—the fellowship member is the only person who may share that information.

Outside the alcohol agency network, the first step in identifying recruitment sources would be to establish liaison with a local volunteer coordinating agency. This is likely to be a registry of persons or organizations whose membership is interested in volunteering.

In contacting organizations directly, the following should not be overlooked:

- **Local groups.** Local groups associated with national organizations interested in the prevention and treatment of alcohol abuse and alcoholism, such as the U.S. Jaycees, the YMCA, and the National Congress of Parents and Teachers, are all potential sources. The National Institute on Alcohol Abuse and Alcoholism's (NIAAA) Division of Prevention can provide a list of contacts for these organizations. (See section V.)
- **Special population national groups.** NIAAA has established a working relationship with a number of organizations to help meet the needs of various racial and ethnic populations. These include the National Black Caucus on Alcoholism, the National Indian Board on Alcoholism and Drug Abuse, and the National Spanish-Speaking Commission on Alcoholism. A local program may benefit from contacting these national groups to seek consultation.
- **Retired persons.** The retired Senior Volunteer Program is a readymade source. The national RSVP headquarters is located at 806 Connecticut Avenue, N.W., Washington, D.C. 20525. Local and regional offices of Action/RSVP, as well as other community service organizations, will be of assistance in recruiting. For additional sources, see section V.

Other organizations for recruiting senior citizens are Golden Age Clubs and the Gray Panthers. These people have much to contribute to the quality of a volunteer program. In recruiting senior volunteers, it should be noted that some members of this population are economically disadvantaged. Expenses may be a concern for potential volunteers among older and retired persons. Reimbursement for transportation and meal expenses should be considered if these are not generally provided.

- **Low-income communities.** Volunteering is often a way of life and mutual survival in low-income communities; it is known as "helping out" or "lending a hand." Formal volunteering in low-income communities is usually thought of as something done by a person from outside the community, usually a person of different racial, ethnic, or economic background. A recruitment plan could build on the community's tradition of "folks helping folks" by recruiting volunteers for work in an agency that belongs to and serves the members of their community. As noted above, any recruitment plan for low-income volunteers should take into consideration reimbursement for the cost of transportation and meals.
- **Churches and other religious organizations.** Church members who are oriented to volunteering their time for worthwhile activities are good potential volunteers.
- **Schools, colleges, and universities.** A rich resource for augmenting special services, students may be able to arrange for their volunteer activities to serve as partial fulfillment of course requirements. Both the volunteer program and the student will benefit.

Strategies for Recruiting

Choosing an appropriate recruiting strategy can be as important as finding the best recruiting source for filling particular volunteer positions. A news release to local newspapers and radio stations is likely to yield two or three dozen prospective volunteers. If only two volunteers are needed, this method is courting ill will. A strategy should be chosen that is most likely to yield the desired number of responses from individuals with suitable skills or background.

The following are strategies which can be used in a recruiting effort:

Word-of-mouth. This is a major recruiting strategy. It is especially effective when the "word" comes from someone who knows and believes in the agency program and understands the objectives of the volunteer program. Examples of word-of-mouth strategies would include personal contacts with individuals in volunteer clearinghouse organizations or department heads of a college or university to elicit their support in recruiting volunteers.

Presentations. If a particular group has a special motivation or interest that is consistent with agency volunteer needs, a group presentation may be the best way to recruit from its membership. Group presentations are especially effective in obtaining contributions that fall into the "donation" or "group effort" volunteer category. The presentation should include a mini-orientation to the agency's goals and objectives and to the volunteer program. Audiovisual aids, such as a slide show of volunteer activities that demonstrates the particular needs for which you are recruiting, may be produced. Audiovisual materials should be used only if they are well-organized and of near-professional quality. Appropriate printed materials, such as brochures, copies of the agency newsletter, or the volunteer job descriptions, should be available at such a presentation.

Mass Media. If a large number of recruits is needed, the mass communications media can be used. Local television and radio stations usually set aside program time for public service announcements. The local news and activities sections of area newspapers will also publish recruitment news releases.

Tools for Recruiting

The Job Description. A volunteer job description, strategically posted on the bulletin board of an organization where the agency's program is known, is a very effective recruiting tool. Job descriptions can be placed with faculty members of local schools or colleges, and with community organizations with which liaison has been established. Word-of-mouth recruiters such as board members, agency staff, family and friends of clients, and graduate clients could benefit from having copies of job descriptions.

Brochures. An expanding volunteer program may need a brochure describing its activities and accomplishments. Development of such a brochure is a project that might be carried out by a group interested in contributing its pooled talents or by a student artist and writer team from a local college's department of communications. A sample volunteer handbook is included in appendix B.

News Releases. If a mass media campaign is considered an appropriate strategy, news releases should be prepared. Here, skilled writing talent is highly desirable; this task may be just the challenge for an able volunteer. The article should be tightly written, including the important details such as who is needed, for what positions, at what times, and where to apply. In metropolitan areas, an advertising agency may donate its time and staff for such a public service project.

Photographs, if they are used, should be in sharp focus and should communicate their messages at a glance. It is best not to try to put more than one idea or statement in a single picture. Eight-by-ten, glossy black and white photographs are preferred for newspaper, magazine, and newsletter reproduction; 35mm color slides are needed for television. Photography students are often eager and willing to shoot assignments for free, just for the experience of getting their pictures published.

Audiovisual Presentations. An audiovisual presentation (slide shows, films, or videotapes) can be highly motivating and can communicate the agency's message succinctly, accurately, and in an entertaining manner. Once developed, this tool can be used repeatedly. However, creating an audiovisual presentation is a major undertaking. The task should be assigned to someone with experience in this area. Again, a student project is a possibility—preferably a group of students who will receive course credit for the production of a well-designed finished product.

Newsletter or House Organ. Including a section on volunteer activities in the agency's newsletter could serve a dual purpose: recognition of volunteer contributions and achievement and continuous volunteer recruitment to meet agency volunteer needs.

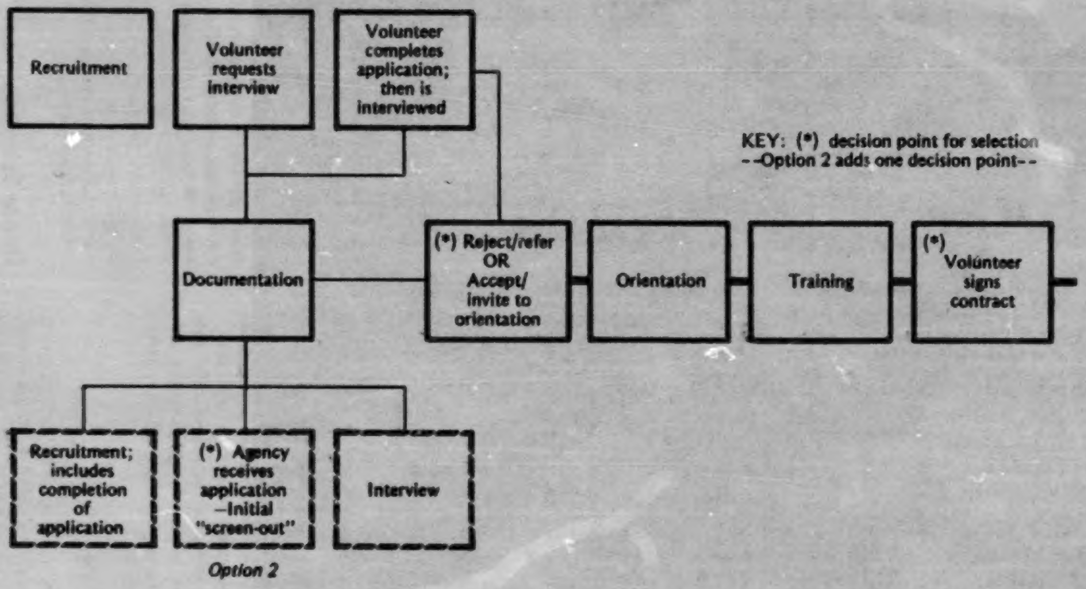
To summarize, the recruitment plan should identify the best sources of volunteers for the pilot program, the strategy for reaching those potential volunteers, and the tools that should be prepared.

Devise Selection Plan

Selection is the link between recruitment and placement of volunteers and is based primarily on the job description and the related qualifications previously specified by staff and the volunteer coordinator. Basically, the process for volunteer selection is the same as for selection of paid staff.

Option 1

SELECTION STRATEGY OPTIONS: Sequence of events


Recruitment
Volunteer requests interview
Volunteer completes application; then is interviewed
KEY: (*) decision point for selection
--Option 2 adds one decision point--
Documentation
(*) Reject/refer OR Accept/ invite to orientation
Orientation
Training
(*) Volunteer signs contract
Recruitment; includes completion of application
(*) Agency receives application —Initial "screen-out"
Interview
Option 2

This section reviews some overall selection considerations, defines the essential elements of the selection plan, and outlines basic interviewing skills.

Overall Strategy Considerations

Depending on the size and scope of the pilot volunteer program and the number and kinds of unpaid staff positions to be filled, the following determinations should be made in order to plan the most appropriate selection strategy:

- How many positions are to be filled?
- What kinds of expertise or background experience are needed to fill these positions?
- Could highly motivated individuals who have related interests and background experience in lieu of the stipulated expertise fill these positions if they receive initial, on-the-job, and/or periodic training?
- If the answer to the above question is yes, are there easily identifiable training needs common to potential volunteers? Determination of probable prospective volunteer training needs will aid in establishing one criterion for selection.
- Who will make the final decision regarding unpaid staff acceptance and placement?
- What resources—people, time, space, money—are available to implement a selection strategy? One crisis intervention program, for instance, uses a three-person screening team (one professional adviser, one experienced telephone aide, and one newly trained telephone aide) to conduct each applicant's 1- to 1½-hour interview. Questions are asked, expectations are expressed, and crisis situations are simulated during the interview. A maximum of 40 to 50 people can be screened over 1 week; however, because the job requires sensitivity and an intensive interview, optimum scheduling is 5 to 10 interviews per week over 2 months.

  Other than staff time required for interviewing, incidental expenses, such as reproduction of forms and extra coffee, should be anticipated. A sample interview logistics checklist is included in appendix B.

Elements of the Selection Plan

Decisions concerning an actual selection strategy should be documented. The schematic on the preceding page is a suggested sequence of events that illustrates two alternative approaches to the application process.

The following steps should be integrated into the plan that is adopted:

Transition from General Recruitment to Actual Application. Where will application forms be distributed? As the dotted lines on the schematic illustrate, application forms may be made available during recruitment, or administered just prior to interviews. It may save time to screen out applications early through distribution and examination of application forms; however, this strategy does not allow for a more subjective approach to selection. An applicant may have interests and talents or other contributions to make that could be determined only during a personal interview.

Scheduling of Interviews. When and where will interviews be held? Who will do the interviewing? Should the interviews be handled on a one-to-one basis or would a team approach be better? Who will handle logistics, including greeting, administration of forms, and actual scheduling of interviews? Will interviews be scheduled by individual job description response, kinds of functions, or "as they come"? This last decision depends on the number and kinds of unpaid positions to be filled and the number of applicants. Categorization of applicants may aid the interviewer in recalling and assessing individual volunteers in terms of personality, abilities, and interests.

Criteria for Selection. As previously mentioned, the job description for each unpaid staff position should include job responsibilities, supervisory procedures, time commitments, and qualifications. The selection of unpaid staff is based on the job description, but other criteria contribute to the final selection decision. The interviewer may want to determine whether the prospective unpaid staff member can fulfill other, more subjective, staff needs. A review of administration and paid staff discussions during the exploration phase and staff concerns about volunteers should determine the kinds of qualities an applicant should bring to the agency so that unpaid staff can be easily integrated into paid staff. These kinds of qualities are generally considered to be desirable:

- **Complementary ideology.** Would the applicant's feelings about alcoholism and underlying issues have a positive impact upon the volunteer program and the agency in general?
- **Complementary personality.** How will the rest of the staff react to the applicant? Despite normal interview-based nervousness, can the applicant express himself or herself adequately? Does the applicant appear to be sensitive to what other people say? Or are there judgments inherent in spoken and unspoken statements?
- **Maturity.** Does the applicant seem to exhibit qualities of stability, responsibility, and flexibility? Although both unpaid and paid staff members may have had problems in the past, the important consideration is that they will be able

to cope with them on the job. Could the applicant judge wisely if called on to make a decision? Will the prospective volunteer be responsible in meeting the orientation, training, and on-the-job commitments? Does the applicant's thinking appear to be so rigid that any change in schedule would disrupt job performance?

- **Motivations and interests.** Even though an individual does not have documented proof of a given skill, there may be some previously untapped interest or ability he or she may be more than willing to contribute to an alcohol agency. A person who has appropriate qualifications but is bored with limited performance in one area can become highly motivated if given a new field of interest. It is desirable to try to discover the applicant's interests and the source of his or her motivation for volunteering during the course of the interview.
- **Realistic expectations.** Motivation grows from the volunteer's realistic expectations concerning his or her direct impact on the client, on the agency, on the volunteer program, and concerning the applicant's own future. Unpaid staff who are overenthusiastic about their capabilities and commitment to the program often burn out after a short period of time. An interviewer's gut feeling may be the only clue as to whether or not the applicant has realistic expectations about his or her role in the program.

Above and beyond these general criteria, there will be other important issues bearing on volunteer selection. Examples include differing agency policies on length of sobriety for former clients who wish to work as volunteers, or the use of volunteers as counselors.

Strategy of Response. All applications and inquiries should be answered in writing. If the applicant is automatically screened out after completing the initial application, a note of appreciation and referral to another agency should be sent. If the applicant warrants further consideration, a note outlining specific qualifications and expectations and an invitation to interview should be sent. Following the interview, a letter of rejection/referral or acceptance/invitation to orientation should be mailed. Telephone inquiries should also be sequenced in the same manner. If, during a conversation, it is clear that the agency cannot benefit from the contribution offered, the person should be referred to another agency. A sample agency referral form is included in appendix B.

Documentation. To ensure that program evaluation needs and unpaid staff concerns are met, all inquiries, initial actions, decisions, and followup should be documented. The selection plan should incorporate a system of logging the specifics of the entire selection process, including who is responsible for the documentation and when. Documentation will ensure that no potential unpaid staff members are lost in the shuffle. Development of the forms and standard letters listed below will facilitate the selection process. Samples of each appear in appendix B.

- **Interview guide.** Use of an interview guide will ensure that interviews are conducted in a consistent manner and that relevant information is recorded. The sample interview guide sheet includes space for documenting the date, length of the interview, name of the applicant, general comments, and recommendations concerning a selection decision.
- **Log of phone inquiries.** A phone log will allow notation of kinds of contributions offered (individual volunteer, group service, special contribution, or donor) and the response each applicant receives (application form, referral, invitation to interview). This log and the interview guide may be used later for program evaluation and personnel appraisal.
- **Community resource referral file.** A list of other community agencies should be available so applicants the agency cannot use can be referred elsewhere. Feedback from these agencies (for instance, their receptivity to certain categories of volunteers) should be incorporated into this file periodically. Many agencies already have such a file, so it may be useful to collaborate with other agencies in the development of this resource. (See sample in appendix B.)
- **Correspondence and forms.** Many transactions with potential volunteers can be handled most efficiently with forms or form letters. Samples of the following are included: application form, including choice sheet and space for references; invitation to interview; notice of acceptance/invitation to orientation; notice of rejection/referral; and agency-volunteer contract. (See appendix B.)

The Interview

A well-planned, well-guided interview gives both the agency interviewer and the applicant a chance to measure each other's needs, expectations, and mutual suitability. The following guidelines will be helpful.

- **Discover the applicant.** Does the applicant meet the job requirements? How would the applicant's previous work experience, interests, and personality mesh with paid staff and administration, and the agency needs in general?
- **Help the applicant to discover the agency.** The applicant will want to know more about the

agency and more about the time, energy, and financial requirements mentioned in the first applicant interest letter.

- **Establish initial rapport.** Feelings of openness, trust, and accountability will result from full disclosure of agency expectations of the volunteer. A friendly atmosphere will open the door for continued rapport if the applicant is accepted, and is good public relations even if the applicant is rejected or referred to another agency.
- **Enforce criteria for selection.** The most important goal of the interview is, of course, to decide whether or not the applicant would be an asset to the alcohol agency—either in the position described in the job description that attracted him or her or perhaps in an unanticipated role—by comparing the applicant's qualifications to previously established criteria for selection.
- **Reach mutual decision.** The final decision regarding selection is actually a mutual decision. The prospective unpaid staff member may feel he or she does not have the time, energy, or financial resources required; may feel inadequate concerning qualifications or past experience; or may have any number of personal reasons for wanting to withdraw application. The entire selection process, and the interview in particular, should result in a realistically achieved mutual decision on selection and acceptance.

Interview Skills

It may be helpful for those assigned to interview prospective volunteers to review basic interviewing skills. The following points may be helpful in postinterview self-evaluation.

- **Listening.** Did I allow the applicant to express his or her interests without responding in a judgmental fashion? Did I allow him or her to finish sentences? Did the applicant feel free to ask questions? An occasional silence is all right. There are times when a person needs time to digest information.
- **Responding.** Did I answer questions directly and succinctly? If I did not know the answer to a question, did I arrange to convey the information at a later time? Brief relevant comments to clarify understanding of the exchanged information are the most valuable contributions to the interchange.
- **Questioning.** Did I ask questions primarily related to the specifics of the job description and applicant expectations? Did I anticipate how the applicant would answer? Did I allow the applicant to respond to leading questions, follow areas of mutual interest and concern, consider options realistically, and make decisions?
- **Demeanor.** Did I behave enthusiastically? Did I look interested in the applicant? Did I help to maintain a realistic approach?

If the interview is comfortable, nonverbal cues (a smile, a nod, a questioning look) will occur naturally. This rapport is what an interviewer should hope to establish. If the applicant is accepted, a basis for mutual responsibility and trust will have been established; if the applicant is referred to another agency, good public relations and flexibility concerning possible future utilization of the applicant will have been achieved. A sample interview guide is included in appendix B.

Develop Orientation Plan

Orientation entails all information that all unpaid staff need to know in order to make a decision to contribute their time to the agency. Separate from skill development or ongoing staff development, orientation presents an overview of program policies, benefits, and responsibilities applicable to all unpaid staff.

Below is an overview of what should be covered in the volunteer orientation plan.

Content

The development of a volunteer handbook containing all of the following information would be desirable; however, if preparation of a handbook is not feasible, sufficient time should be scheduled to cover each of the following areas in a group meeting.

- Program policies, especially those that directly affect the unpaid staff. These would include regulations concerning confidentiality and insurance liability, discussion of the volunteer-agency contract, "volunteer rights" (see sample draft in appendix B), program evaluation and personnel appraisal, volunteer status (for instance, probationary contingencies), and agencywide staff responsibilities.
- Information regarding transportation and reimbursement.
- Announcement of upcoming events including preservice and inservice training content overview, unpaid staff responsibilities for attendance and contribution, and date of actual placement.
- A tour of the facility and introductory meeting with paid staff and administration.
- Unpaid staff's questions and feedback.

Logistics

As with the selection plan, the orientation plan should take into consideration the resources and constraints of time, money, people, and space. The interview logistics checklist in appendix B can also be used as a reminder for applicable items. Prior to implementation, a checklist tailored specifically to the individual agency's orientation plan should be developed.

Design Training Plan

Training is part of the agency's responsibility to all unpaid staff and is included on every list of factors essential to the development of an effective volunteer program. The comments in this section pertain particularly to the training of the individual volunteer working as unpaid staff on a regular basis for a period of at least 6 months, but the principles and planning sequence are the same for all volunteers.

How Training Fits In

A training program must be designed with reference to all the contacts made between agency and volunteer. From recruitment through selection, orientation, and preservice training to inservice training, opportunities are available to help the volunteer prepare to perform his or her job effectively. Different training goals will apply at different stages.

- Recruitment, selection, and orientation help both the agency and the volunteer learn enough about each other to make a decision to work together.
- Preservice training covers the knowledge, attitudes, and skills the volunteer needs to perform the job.
- Inservice training helps the volunteer to improve his/her effectiveness and to assume jobs of differing or greater responsibility.

Each stage should build on the preceding stage to avoid unnecessary duplication. Generally, the areas touched on in each stage are similar, but at each succeeding stage the material included becomes more specific. Regarding the problem of alcohol abuse and alcoholism, for example, recruitment information would cover an overview of the problem, current efforts to combat it, and the agency's role in that effort. Orientation would emphasize the known facts about alcohol abuse and about its prevention and the treatment and rehabilitation of those with the problem. Training would focus on establishing a helping relationship with an individual who has an alcohol-related problem.

Other Outcomes of Training

Aside from the purposes of training already mentioned—volunteer selection and preparation for the task to be performed—training has other outcomes.

- Training is good public education. The people who participate will be better informed about the problems of alcohol abuse and alcoholism and the attempts to combat those problems.
- Training is good public relations. It informs people about the agency and its contribution to the community. Training participants are in a better position to interpret the agency to the community and to solicit support through contributions of money, goods, and services.
- Training programs of good quality aid in recruiting more volunteers.
- Training sessions provide an opportunity for volunteers to begin to build individual confidence and mutual support and enthusiasm.
- The helping relationship established between volunteers and staff during the training period is the beginning of a constructive supervision process.

Objectives

The objectives of the formal preservice training program are derived from the job description and from the needs of the volunteers who are selected to fill the position. Although the training program must be planned before it is known exactly who the volunteers will be, the job qualifications and the selection criteria developed by the staff will help to create a preliminary profile of the prospective trainee. Information gathered from applications and personal interviews will confirm the original estimate of need or provide direction in making modifications in the training plan. The key word is flexibility—being responsive to the ideas and suggestions of the volunteers themselves as training proceeds.

The objectives specified for the training program will probably fall into one or more of the following categories: knowledge, attitudes, skills. Knowledge is information about alcohol, alcoholism, treatment, community resources, and the agency program. A sample objective in this category is:

> When asked to describe the agency's program, the volunteer's response will include an accurate statement about the program goals, services offered, client capacity, staff size and capabilities, and annual budget.

Attitudes or opinions about various issues are based on an individual's values and beliefs, and attitudes affect behavior. For example, the individual who believes that drinking is evil and immoral will probably be constrained in his or her behavior toward those who drink even though the conscious intention is to be helpful.

Attitudes change slowly. An attitude based on false information can sometimes be changed by correct information. Discussion of one's attitudes with others—exchanging views, exploring the relationships of attitudes and behavior, and examining alternatives—often leads to greater change. Experience generally has the heaviest impact on attitude change.

The primary goal and most desirable outcome of a preservice training program is that trainees will become more aware of their own attitudes and the relation between those attitudes and their behavior. A sample objective in this category is:

> The volunteer will demonstrate an awareness of how his or her own attitude toward drinking and drinkers can facilitate or impede a client's recovery by distinguishing between potentially positive or negative practices from a list of statements that describe typical situations in a treatment program.

Skills, the third category of objectives, involve the techniques a volunteer must have to perform the job, such as answering the telephone, making an appropriate referral, or developing a helping relationship with a client. A sample objective in this category is:

> The volunteer will make an appropriate response to six or eight typical client questions or statements in a hypothetical situation. Appropriateness will be judged by trainer and other volunteers using a set of recommended guidelines.

Training Methods

The methods used in training will depend upon the training objectives. Also, methods should be selected with the following in mind:

- People learn best by doing.
- Adults bring with them a wealth of knowledge and experience; tap this resource by including in every session an opportunity for volunteers to raise questions, share their reactions, and discuss issues. For this purpose, groups of four to six people permit maximum participation by each member.
- The purpose of the session and how it relates to the volunteer's role and to previous and subsequent sessions should be made explicit at each session.
- Individuals differ in their learning styles and preferences. Therefore, use a variety of methods within one session and throughout the training program. This strategy also maintains interest and reduces fatigue.

Matching Methods and Objectives

For presentation of information, choose a lecture as the last alternative. A visit to an agency is much more effective than a verbal description. A film can dramatize the nature and extent of a problem with greater impact than an oral presentation. If a lecture is used, keep it short; illustrate it visually with diagrams, key words on a flipchart, or slides; and provide trainees with a written summary of the key points at the end of the session. Sample situations or case studies give trainees an opportunity to apply the facts they are learning. They can stimulate questions and increase understanding.

Methods suitable for objectives relating to attitudes include group discussion, role playing, and self-discovery or self-assessment questionnaires. A relaxed, nonjudgmental atmosphere should be established for effective attitude exploration. There are no right or wrong answers in this area. Rather, the focus is on exploring the range of attitudes in the group, how they relate to the volunteer role, and alternative ways to handle those attitudes that might interfere with effective performance.

Methods appropriate for learning skills generally include demonstration, practice, and feedback. A demonstration of the skill provides a model. Practice and feedback permit the trainee successive chances to approximate the model performance with guidance from the trainer and the other trainees. If available, videotape and audiotape offer the advantage of allowing the trainee to see and correct his or her own performance.

Logistics. Well-thought-out physical arrangements for the training program set the climate for learning and convey the seriousness with which training is viewed by the agency.

Space. Aside from the obvious considerations of light, comfort, good ventilation, and roominess, the training space should be free from distractions and interruptions. It should be able to accommodate audiovisual equipment if this medium is to be used. Can the room be darkened to show a film? Are electrical outlets convenient? Will the screen be clearly visible to all?

The training location should be selected for accessibility. If suitable space is available in the agency, this will facilitate staff participation. The location should be convenient for volunteers using public transportation and private automobiles.

Alternative sites for training include other social service agencies, churches, local universities, and libraries. Some business organizations have meeting rooms that they might be willing to make available. Whatever site is chosen should be available for all sessions of a given training cycle.

Timing. This factor includes two considerations: when and how long. When will depend upon the volunteers who will be attending. Evenings will be most suitable for those employed full time. Mornings and afternoons may be preferred by others. If it is not possible to find a time when everyone can come, or if the group is too large, two simultaneous programs will usually accommodate the needs of everyone.

Customarily, preservice training takes a maximum of 10 hours. Training schedules from a variety of volunteer programs show this time divided over three consecutive evenings or a day and a half, or allocated intermittently over four or five evenings in a 2-week period. Generally the aim is to complete preservice training in as short a time as possible to sustain the volunteers' enthusiasm and to place them in their assigned jobs with dispatch.

Inservice training can occur on a weekly or monthly basis for 1 to 2 hours per session and may be allocated among several activities:

- an individual meeting with the staff supervisor;
- a small group meeting with topics selected by volunteers or trainer;
- followup meetings with the volunteer coordinator, especially in the early weeks of service, to discuss volunteers' concerns and special problems; and/or
- attendance at staff meetings, open A.A. meetings, and educational meetings offered by other local agencies.

A description of a specific volunteer program and its accompanying inservice training design are included in appendix B.

Miscellaneous. Name tags should be provided for everyone and worn at every session. At the first meeting of the group, time should be set aside for a getting-acquainted exercise. This activity is important not only to introduce participants to each other but also to accelerate the pace at which participants become involved in and make contributions to the sessions.

Simple refreshments offered prior to and midway through each session establish a relaxed, social climate and help participants to become acquainted informally.

Staffing

In addition to coordinating the design and logistics of the training program, the volunteer coordinator provides continuity for all sessions by greeting volunteers, introducing trainers, and linking sessions. The training sessions provide an excellent opportunity for the coordinators to get to know the volunteers and to establish the relationship with each that will ease the transition from newcomers in the agency to experienced, unpaid staff members.

It is advisable to have a second person available to attend to such matters as taking attendance, preparing coffee, distributing materials, and taking messages.

If small group discussion leaders are needed, they may be recruited from staff and, later on, from experienced volunteers. This group should be selected and prepared well in advance of the first session. This involvement of paid and unpaid staff in the preservice training program will further facilitate the transition and integration of new volunteers into the program.

Resources

As a rule, the amount of money available in an agency budget to support staff training is small. The amount available for volunteer training will probably be even less, despite the importance of such training. This fact will challenge the ingenuity of the training program planners to deliver the best training possible for the least amount of money.

The organizational resources identified during the exploration phase will be of great help in getting started. Some will be close to home; others will be far afield.

- Start within the agency. Perhaps a staff member has training experience that could be tapped. Others may be interested in learning more about training. They can help in the design and may serve as small group leaders.
- An experienced trainer may be located at a nearby university, in an already established volunteer program, or in the State alcohol agency or volunteer bureau. This person could be invaluable in helping to design the program.
- Once the program is designed, the next step is to identify the people and materials you will need to deliver the training.
- Look for existing programs in similar agencies that might be open to your volunteers.
- Does another agency have similar training needs? Could you team up?
- College faculty and students may donate their time to develop audiovisual materials.
- College libraries may lend films and videotapes from their collections or obtain them from a larger university film library. Check their catalogs.
- The National Clearinghouse for Alcohol Information provides free pamphlets and other materials on request.
- For certain purposes, experienced volunteers and former clients may combine the experience and necessary capability to contribute to the training program.

This is only a beginning list. Names and addresses of organizations to contact and suggested materials are listed in section V.

Formal Recognition

Some agencies mark the end of the preservice training program with a simple ceremony. A brief welcome to the agency by the director or board president, followed by presentation of name pins or other identifying badges, is one possibility.

Followup

In addition to the inservice training suggestions listed, other formal and informal opportunities should be provided to volunteers.

- Invite them to use the agency library.
- Distribute a reading list of relevant fiction and nonfiction.
- Include them in regular agency inservice sessions.
- Attendance at summer schools of alcohol studies will increase their knowledge of and involvement with the field at large.

Evaluation

Evaluation of the training program may be simple or elaborate, depending upon the resources available and the precision of the data that is needed. Again, the local university may provide faculty or graduate students who would assist in this activity at little or no cost.

At minimum, training evaluation should include

- observation of trainees' attendance, level of participation, and overall reactions to each training session;
- written feedback from trainees on the value of training at the end of the last session and after a 3- to 6-month interval;
- observation of volunteer performance on the job;
- reports of paid staff regarding volunteer performance.

Sample evaluation forms are included in appendix B.

Devise Evaluation Plan

On the diagram illustrating the process of volunteer program development, the evaluation plan is the last step in the pilot program design phase. This does not mean that no thought is given to evaluation until this point in program design; on the contrary, as pointed out in section I, evaluation must be a continuous process from the beginning of program development. What might be described as an appraising habit of mind should cause one to examine the effects of plans and actions at frequent intervals even as the planning and implementation are in progress.

The interweaving of evaluation with plans and actions is reflected throughout the guide. The end of the exploration phase is a checkpoint at which to assess the thoroughness and effectiveness of the efforts to secure agency and staff commitment to a volunteer program and to explore the feasibility of a volunteer program in the agency. Evaluation is referred to throughout the pilot program design phase in the discussions of procedures, recruitment, selection, orientation, and training plans. Reference is made in each step to the relationship between that step and evaluation and to the indicators of success of the design and implementation of that step. For example, records are essential tools for the collection of quantitative evaluation data. The completeness, accuracy, and relevance of the data contained in the records will be a measure of the attention given to the design of the records and the procedures for keeping them.

The comments in this section will pertain primarily to evaluating the pilot program after volunteers have been working for at least 6 months. This evaluation effort will lead to conclusions and recommendations about the future direction of the volunteer program and the modification of the pilot program design necessary to strengthen the program.

Objectives

The evaluation plan has two sets of objectives. First, the objectives specified for the pilot program determine what to look for as indications that program objectives have been achieved. Second, objectives can be specified for the evaluation plan itself.

The first program objective is to determine the extent to which the program provides satisfying, purposeful work for unpaid staff; the second is to determine whether the program is to be continued.

What to Look For

The evaluation plan should specify forms and procedures for collecting both quantitative and qualitative data. Quantitative data include those things that can be counted: dollars, hours, and people. Qualitative data include how people feel about the program and how they perceive it. Both are equally important. The program may be extremely efficient in terms of the number of volunteers recruited and trained per dollar spent, but if volunteers are dissatisfied or clients do not think the program is helpful, the efficiency of the program is wasted. On the other hand, if everyone is satisfied and happy but the cost of the program exceeds the agency's resources to support it, a good program is very likely to be discontinued.

Quantitative Data. The records of the volunteer program should be designed and maintained to yield such information as:

- the number of hours of volunteer service,
- the number of staff hours spent in supervision and training (ask both staff and volunteers independently how much time they spend together),
- the cost of supporting the program (coordinator's time, training costs, reimbursement of expenses, materials, production, and so forth),
- the number of clients served, and
- the number of volunteers who leave before the end of their commitment.

With this information, program statistics can be developed regarding

- the ratio of staff hours to volunteer hours (one program sets 1 to 15 as an acceptable standard for a fully operating program), and
- the ratio between the value of volunteer service and the cost of program support. (The standard for the dollar value of volunteer time in one progr[illegible] $3 to $4 per hour; a more accurate figure, if a prevailing wage is known, is what the agency would have to pay per hour for equivalent services.)

Qualitative Data. Informal observation and listening are two of the most useful methods for collecting information about the program. At meetings, during training, on the job, and in casual conversations, what people do and say provide valuable clues to the health of the volunteer program.

These informal observations can be checked by simple forms or questionnaires completed by staff, volunteers, and clients. In addition, the Planning Committee Checklist in appendix A can be adapted for evaluating continuing commitment to the program. A fourth suggested form is a checklist for evaluating administrative procedures, to be completed independently by the volunteer coordinator, members of the volunteer committee, and the agency director, and then compared. Sample forms, in each of these categories are included in appendix B.

Resources

Plan to get extra help to perform the evaluation tasks. Expert guidance in designing the evaluation may be found among local university faculty with experience in research and evaluation and the Area Alcohol Education and Training Program. Volunteers can help with recordkeeping; tabulation of data; and distribution and collection of staff, volunteer, and client reaction forms.

There are two important things to remember about evaluation:

- Do it no matter how limited the resources; an evaluation does not have to be technically perfect to provide useful information.
- Act on it. When you have the information, put it to work immediately to strengthen what is good and improve what can be better. Do not forget to let people know what the evaluation results are.

Plan Budget

Throughout the pilot program design phase, the volunteer coordinator will be responsible for planning the allocation of the total amount of money allotted by the board to finance the volunteer program. Some of the total amount may already be committed for the volunteer coordinator's salary and insurance coverage. The remainder must be apportioned among expenses such as consultant fees for conducting training, purchase or production of materials, reimbursement of volunteer expenses such as transportation, special supplies needed for program activities (refreshments, craft supplies, and so forth), and salaries of other paid staff connected with planning and implementing the volunteer program.

As program design proceeds through planning of procedures, recruitment, selection, orientation, training, and evaluation, the selected approaches must take into account the limitations imposed by the budget. It may be necessary to modify decisions made in one or more areas. For example, it might be determined that funds would be better spent to reimburse expenses of volunteer staff than to hire a consultant for the training program.

One alternative when funds are limited is to elicit donations of services, such as printing or reproduction of volunteer program materials, or of materials and equipment such as paint, paper, or recordplayer.

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Implementation Plan

This section concerns putting the pilot volunteer program into action. Implementation is the testing of all the plans developed in the pilot program design phase: using the job descriptions; initiating volunteer program procedures; launching recruitment, selection, orientation, and training of volunteers; evaluating how well the program is achieving its goals and objectives; determining whether or not to expand the volunteer program beyond the scope of the pilot program, and, if so, whether or not changes should be made in any part of the program design.

The pilot program implementation cycle should be a time of continual checking.

- Which program goals and objectives need adjusting?
- Are the plans and procedures flexible enough?
- What is being learned that would indicate a need to revise administrative procedures; recruitment strategies; the selection, orientation, and training process; and/or the budget?
- How have staff and clients been affected by the efforts of volunteers?
- How is volunteer morale?
- Which volunteers are ready for leadership roles? For new assignments?
- What are the indicators of program success which the board members will want to hear about before recommending expansion the program beyond the pilot phase?

To aid in the successful implementation of the pilot program, a discussion of staff orientation and volunteer recognition is included in this section.

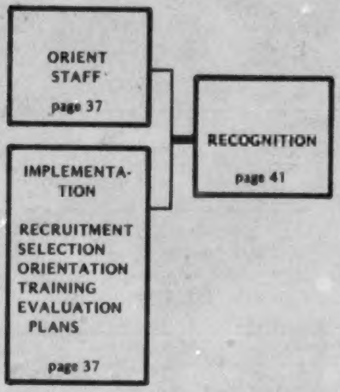
Orient Staff

Orienting staff to the use of volunteers is a communications process that begins with staff representation on the planning committee and never ends. Without an orientation process—and its outgrowth of staff commitment and support of the volunteer program—the pilot volunteer program cannot succeed.

Objectives of staff orientation are

- to develop staff understanding of volunteer programs and, as an outgrowth of that understanding, staff commitment to and support of the proposed program;
- to encourage and enable staff to take responsibility, both professional and personal, for the success of the program and to derive satisfaction from that responsibility;
- to develop between staff and volunteers a working and positive partnership in the offering of services to clients;
- to achieve changes in attitudes through the exchange of information about volunteer effectiveness (there can be no staff training until

IMPLEMENTATION PHASE – 6 to 9 months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there is enough staff interest in volunteers to ensure a commitment to learning about them); and

- to develop a process of negotiation and communication between staff and the volunteer coordinator to deal with mutual concerns about volunteer/staff relationships and volunteer program effectiveness.

Staff Concerns

Specific staff concerns about volunteers include the fears that volunteers will not be effective with clients and may actually harm them; that their own professional status, perhaps still being determined, will be undermined by volunteers; that they will lose control of volunteers because they are unpaid and therefore unaccountable to the staff and the agency; that volunteers will see and judge the day-to-day realities—and perhaps inadequacies—of staff efforts and talk publicly about them; that something new—the volunteer—makes the world a little more unmanageable, more difficult to cope with; and finally, staff may be reluctant to articulate their conflicting feelings about volunteers, to criticize well-intentioned, nice people who are giving their time for free.

All of these concerns are real, but they can be alleviated through staff orientation activities.

The volunteer coordinator takes primary responsibility for the orientation of staff to volunteers, although much initial orientation work will have to be done by the planning committee prior to the selection of the volunteer coordinator. Others assisting the volunteer coordinator will be those staff members who have had experience with volunteers, veteran volunteers, and, when appropriate, outside experts in communications.

Orientation Phases

Staff orientation and training can be considered and planned in two phases corresponding to volunteer program planning phases, preprogram orientation at the exploration phase and program orientation and training at the pilot program design phase. Preprogram orientation will include:

- representation on the planning committee;
- contribution to the selection of the volunteer coordinator;
- ventilation—the exploration of initial staff attitudes in regard to volunteers and the identification of staff receptive to working with volunteers;
- identification with volunteers—activities and role playing exercises designed to encourage staff to identify with volunteers and their roles;
- information—activities and sessions designed to make available to staff data on the positive impact of volunteers in agencies, descriptions of well-managed volunteer programs, and the variety of volunteer roles and functions; and
- staff needs identification and volunteer job processing—activities designed to elicit staff needs and corresponding potential volunteer jobs and job descriptions.

Program orientation and training at the pilot program design phase will include

- pilot program design and procedures information—sessions to inform staff of the specific structure of and procedures for the pilot program and the various plans relating to its implementation;
- staff training in the form of regularly scheduled small group meetings with staff to continue orientation to volunteers and for developing positive staff/volunteer relationships; and
- staff supervision of volunteers—a series of training sessions for staff who supervise volunteers directly.

The rationale for staff representation on the planning committee and for staff involvement in the selection of the volunteer coordinator has been addressed, but, to reiterate, those involvements are "first steps" toward the achievement of staff commitment and involvement in the volunteer program.

Ventilation

Informal "rap" or "ventilation" sessions, facilitated by the planning committee coordinator, should be scheduled at the outset of the exploration phase. Sessions can be continued throughout program development and can include volunteers as the pilot program is implemented.

Small group sessions of from 5 to 10 staff members will allow the facilitator to begin to inform staff about the use and effectiveness of volunteers, to deal with individual staff attitudes about volunteers, and to identify those staff members who may later want to become more heavily involved in the volunteer program.

Initial sessions should be limited to staff only. The administrator can be present at the beginning of the first session to demonstrate his or her support of the utilization of volunteers.

In the first session, the facilitator should create an atmosphere allowing open, honest, critical discussion and should pledge confidentiality. Initial discussion can be centered on basic misconceptions about volunteer roles and effectiveness based on lack of information about volunteerism. These points should be made:

- Volunteers supplement staff; they do not replace staff. Volunteers extend staff capabilities.
- Because volunteers can be just about anyone, they can do just about anything. So regardless of what is needed by staff, it is likely that someone can be found who can do it.

Identification with the Volunteer

As a continuation of the ventilation sessions, the facilitator can begin to assist staff in identifying with volunteers and their roles. Frequently volunteers and paid staff cite similar reasons for choosing to work in the alcohol field. An orientation exercise that encourages discussion and comparison of volunteer and paid staff motivation is one way to illustrate this parallel. This exercise helps to create solidarity in a helping agency and, hence, ease the integration of volunteers into the agency. In addition, understanding staff involvement in the field and understanding the volunteer's need to contribute in general may uncover strategies for recognition of paid and unpaid staff.

Analysis of reasons for involvement uncovers two main motivations among volunteers: a particular interest in alcoholism services and a primary interest in volunteering, per se. Both groups have basic motivations for involvement.

- **Career Development.** Attainment of knowledge, skills, and contacts in the alcoholism field may improve chances of paid or unpaid job advancement. Volunteer work may be applied for credit in a college or university program.
- **Personal Responsibility.** An individual who once had an alcohol-related problem, or knows someone close who had or has such a problem may want to pay a debt to the field for personal recovery or learn more about alcoholism and the available resources.
- **Social Interaction.** Volunteering may fulfill a need to belong, to conform, to gain civic recognition, or to meet new people.
- **Search for Identity.** Some personal needs—to fill a void, to fill time, to feel creative, to commit oneself to a cause and feel worthwhile, to understand oneself better through understanding of others—are fulfilled by volunteering in an alcoholism agency.
- **Miscellaneous.** "Trigger events"—a talk with a friend in the field, reading an article about alcoholism, or responding to a recruitment plea—may spark one's interest in volunteering. This initial, sometimes undirected, interest and enthusiasm, if encouraged and appropriately utilized, often leads to long-term commitment.

Another approach to analyzing motivations for volunteering is discussed in *Volunteers Today* by Harriet Naylor. The complete citation for this book is contained in section V under Comprehensive Planning: Overview.

Within the broad definition of the volunteer—anyone who does something for his community because he wants to—staff can discuss their own experiences as volunteers. They can analyze their own contributions, their relationships as volunteers with agency staff, and their own effectiveness as volunteers. Also valuable would be to link the staff's experience either as volunteers or college interns to their career decisions or to paid job status. Drawing these parallels will help staff to view the volunteer as less alien or threatening to staff.

Staff can also attend volunteer preservice and inservice orientation meetings. Rap sessions can be scheduled with staff and with veteran volunteers either from the agency or from another agency nearby. Open discussion with veteran volunteers will help to allay staff stereotypes of volunteers. Sessions can also be designed to allow staff to exchange views with staff from agencies that have well-managed volunteer programs.

Information

Data on the positive impact of volunteers on clients in well-managed volunteer programs, volunteer roles in relationship to those of staff, and the varieties of volunteer roles can be provided to staff in sessions designed solely for that purpose. Alternatively, or additionally, it may be incorporated in the design of other orientation activities, such as the initial rap or ventilation session.

Staff Needs Identification and Volunteer Job Processing

Activities designed to elicit needs of staff in the exploration phase of program planning include the "jobs we're doing" and "jobs we want to do" and the needs overlap analysis in the helping process (NOAH) procedures described in section II. These formats can be tailored or modified to meet individual agency structure.

Program Orientation and Training

This orientation information can be disseminated in large group sessions prior to pilot program implementation to furnish staff with the results of all planning in the exploration and design phases of program development. It should cover the specifics of the proposed pilot program including its structure, goals, and objectives; the procedures and plans developed to implement it; and job descriptions, forms, and contracts.

Staff Training

The volunteer coordinator should be given time in every regular staff inservice or preservice meeting to continue staff orientation to the use of volunteers and to deal with difficulties in staff/volunteer relationships as they arise. In addition, the coordinator should schedule regular, possibly weekly, meetings with all staff directly involved with the volunteer program to discuss problem areas or to train staff in the supervision of volunteers.

Staff Supervision of Volunteers

Staff supervising volunteers should be given the same training that would be required to enable them to supervise paid staff with adaptations based on the differences between volunteers and paid staff. Special qualities of the volunteer are they are unpaid, part time, and numerous (in some programs they outnumber staff).

Major components of staff training for supervising volunteers include

- basic supervision techniques;
- teamwork and management, emphasizing leadership techniques that are nondefensive and democratic;
- delegation of authority;
- getting assistance from the volunteer program resources people;
- communication skills; and
- motivation techniques. Because volunteers are unpaid, staff must be skilled in giving people other incentives to work.

Staff training for supervision should stress that volunteers are extensions of their capabilities, not a substitute for them, and that initially the time spent in supervising volunteers will equal the time volunteers spend on the job, but that this ratio will improve over time.

A sample staff supervision training design is included in appendix C.

Recognition

Both staff and volunteers must derive satisfaction from and be recognized for their efforts in the volunteer program. Staff will achieve that satisfaction and recognition from their continuous involvement in the planning, design, and evaluation of the volunteer program. Because volunteers do not get paid, nonmonetary factors are critically important to volunteer satisfaction and support. If recognition factors are not considered and built into the volunteer program, volunteer turnover will be high.

Incentives and support for volunteers can be considered in three categories: formal recognition, natural byproducts of good program management, and informal motivators.

Formal Recognition

Any of the following types of formal recognition events or activities can be selected for their appropriateness to the agency and/or modified to fit individual volunteer programs. If any of these formal modes are used, staff should also be recognized for their leadership during the event. In addition, volunteer coordinators must be sensitive to the fact that many volunteers do not *want* public recognition of their work. Formal modes include

- volunteer recognition banquets, generally once a year, and/or informal picnics and parties;
- volunteer I.D. cards or lapel pins;
- swearing-in ceremonies;
- a personal appreciation letter from a program leader at the beginning of service and/or after a successful term of service;
- a volunteer recognition certificate at the end of a successful term of service and/or for outstanding, long-term service (usually presented publicly, often at the banquet);
- "Volunteer of the Month" and/or "Volunteer of the Year" awards, noted in the program newsletter or in the news media;
- published news or human interest stories about volunteers in the program; and
- an honor roll of active volunteers.

Natural Byproducts of Good Program Leadership

The entire volunteer program—its attractiveness, its leadership, and its challenge—is the prime motivator for the volunteer. Every component of the program is critical to volunteer incentive and support.

Good program planning guarantees that volunteers will have worthwhile jobs. Effective leadership and supervision by staff who are committed to the success of the volunteer program are vitally important to volunteer support and involvement. Volunteer interest and responsibility are encouraged and ensured by the inclusion of volunteers in program planning, by being given opportunities for promotion and training, and by the provision of a special, regular workplace.

Good recruiting and screening of volunteers will help to ensure the selection of the right and largely self-motivated person for the job. It is far less difficult to provide incentives for those who are already motivated to work. Training of volunteers will help to eliminate the volunteer who is not interested in learning and growing.

Matching of volunteers to the right jobs, clients, and supervisors is also critical. If matched properly, the client will become the chief motivator of the volunteer.

An equally important motivational factor is evaluation. Because the goal of volunteer utilization is providing the highest quality services possible to clients, the volunteer's work must be evaluated for the good of the client as well as that of the agency and the volunteer. To ensure the serious volunteer's continued interest in his or her work, performance must be evaluated constructively, so he or she can make improvements or be credited with having achieved a high level of performance.

A major deterrent to volunteer satisfaction and motivation is isolation. Frequent communication with the volunteer on the job, through preservice and inservice meetings and through small group rap sessions, is essential to keeping a volunteer.

Informal Motivators

Perhaps most important to the volunteer is informal communication and personal recognition. Three-second motivators—"Hi, how are you? You did a nice job with Tom Jones last week"—can be far more important to the volunteer than being handed a certificate at a recognition banquet at the end of the year. In addition, a measure of recognition and respect of the volunteer for staff member and the staff member for volunteer, is the talk of personal concerns, children, regular job, and so forth, or the asking for advice on problems not related to the volunteer assignment—the natural, informal interactions between people who like, respect, and value each other. These indicators of respect are to be encouraged; no amount of formal recognition can replace them.

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SECTION V

Resources

This section identifies pertinent literature and other resources that will be helpful to persons planning a volunteer program. The contents are listed below for ease of reference to the information desired.

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Part 1: Literature

The following resources are listed under the subject category of primary emphasis in the particular publication. Names and addresses of the publishers and distributors most frequently cited are listed alphabetically at the end of part 1.

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AAVS Newsletter, published monthly by Association for Administration of Volunteer Services, National Headquarters: 18 S. Michigan Avenue, Chicago, Ill. 60603. (Subscription included with membership.)

Adult Education, published quarterly (February, May, August, November) by the Adult Education Association of the U.S.A.: 810 Eighteenth Street, N.W., Washington, D.C. 20006. $11.00/year.

Dateline, published 10 times annually by the Adult Education Association of the U.S.A.: 810 Eighteenth Street, N.W., Washington, D.C. 20006. $7.00/year.

Educational Technology, published monthly by Educational Technology Publications, Englewood Cliffs, N.J., 17632. $21.00/year.

Training and Development Journal, published monthly by the American Society for Training and Development, P.O. Box 5307, Madison, Wis. 53705. $18.00/year.

Voluntary Action Leadership, published quarterly by the National Center for Voluntary Action, 1785 Massachusetts Avenue, N.W., Washington, D.C. 20036. Free.

Voluntary Action News, published bimonthly by the National Center for Voluntary Action, Washington, D.C. Free.

Volunteer Administration, published quarterly by Northeastern University, Boston, Mass.

Volunteer Leader (formerly *The Auxiliary Leader),* published monthly for hospital auxiliaries by American Hospital Association, Chicago, Ill.

Volunteer's Digest, published bimonthly by Volunteer Community Activities Clearinghouse, Washington, D.C.

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Wiser, Betty H. *Resources for Developing Volunteer Programs: An Annotated Bibliography.* Raleigh, N.C.: North Carolina State University, 1971. (New condensed version available May 1976 by writing: Office of Citizen Participation, 409 North Wilmington, Raleigh, N.C. 27061.)

Publishers and Distributors

Adult Education Association
of the United States
810 Eighteenth Street, N.W.
Washington, D.C. 20006

American Association of Volunteer
Services
(formerly American Association of Volunteer
Service Coordinators)
National Headquarters
18 S. Michigan Avenue
Chicago, Ill. 60603

Leadership Resources, Inc.
1 First Virginia Plaza
Suite 344
6400 Arlington Boulevard
Falls Church, Va. 22042

National Center for Voluntary Action
1785 Massachusetts Avenue, N.W.
Washington, D.C. 20036

National Clearinghouse for Alcohol Information
Box 2345
Rockville, Md. 20852

National Drug Abuse Center—write to:
National Drug Abuse Materials Distribution Center
P.O. Box 398
McLean, Va. 22101

National Information Center on Volunteerism, Inc.
P.O. Box 4179
Boulder, Colo. 80306
(303) 447-0492

NTL Learning Resources Corporation
2817-N Dorr Avenue
Fairfax, Va. 22030

U.S. Government Printing Office—write to:
Public Documents
U.S. Government Printing Office
Washington, D.C. 20402

Voluntary Action Center
P.O. Box 459
Grand Central Station
New York, N.Y. 10017

Part 2: Special Assistance

Volunteer-Related Associations

ACTION
806 Connecticut Avenue, N.W.
Washington, D.C. 20625

programs: VISTA; National Student Volunteer Programs; Foster Grandparents, and Retired Senior Volunteer Programs; Small Business Administration's Service Corps of Retired Executives and Active Corps of Executives.

AMERICAN ASSOCIATION OF VOLUNTEER SERVICES (AAVS)
(formerly American Association of Volunteer Service Coordinators)
National Headquarters
18 S. Michigan Avenue
Chicago, Ill. 60603

brochures: **The Certification Plan** describes AAVS requirements for certifying "professional personnel in the field of volunteer administration . . . as set forth by the Committee on Certification."
The AAVSC describes the objectives of the association, membership requirements, and certification for volunteer administration.

LOS ANGELES VOLUNTARY ACTION CENTER
621 S. Virgil Avenue
Los Angeles, Calif. 90005
(213) 389-1221

services: Ask for publications and information regarding volunteer accessories and training materials.

NATIONAL ACADEMY FOR VOLUNTARISM
United Way of America
801 N. Fairfax Street
Alexandria, Va. 22314

brochures: "1976 Courses, Seminars, Roundtables" describes available training programs listed below.

programs: United Way Fund Raising Techniques (I, II, III); United Way Planning; "Thinking Ahead" 1996; United Way Communications (I, II, III); Professional Communications Skills and Techniques Seminar; Management Skills (I, II, III); Management Skills Seminar; Management of Internal Administration; Managing a United Way—A Primer for New Executives; Government Relations Symposium; The Management of Information and Referral Agencies; Professional Selling Skills; Professional Development Planner.

NATIONAL CENTER FOR VOLUNTARY ACTION
1785 Massachusetts Avenue, N.W.
Washington, D.C. 20036

brochures: "Clearinghouse" (miniportfolio and maxiportfolio) describes publications, portfolios and notebooks, and services, including an at-cost consultant network, a proposed training network, listings of State voluntary offices, and existing program descriptions.

"A Nation of Volunteers" describes the center.

"College-University Resources in Education and Training for Voluntary Action" describes institutions which are planning or already have courses and training programs and workshops related to volunteer program development.

programs: (currently being developed by NCVA's education and training department)
Planning and Conducting a Workshop; Organizational Goals, Objectives, and Program Evaluation; Training for Improved Board Service; Finance, Legislation, Regulation, and Government Agencies; Training and Retaining Volunteers from Low-Income Communities; Developing and Maintaining a Community Clearinghouse; Two-Year Curriculum in Volunteer Administration.

NATIONAL INFORMATION CENTER ON VOLUNTEERISM, INC. (NICOV)

Out-of-State inquiries:
1221 University Avenue
P.O. Box 4179
Boulder, Colo. 80302

In Colorado:
State Volunteer Services Coordinator
323 State Capitol
Denver, Colo. 80203

brochures: "Services and Publications" describes workshops, onsite consultative assistance for volunteer program development, information systems, and publications.

"Educational Opportunities" lists volunteer leadership course contacts.

Alcohol Information Resource Centers

ALCOHOLICS ANONYMOUS
P.O. Box 459
Grand Central Station
New York, N.Y. 10017

ALCOHOL AND DRUG PROBLEMS ASSOCIATION
1130 17th Street, N.W.
Washington, D.C. 20036

AL-ANON FAMILY GROUP
115 E. 23rd Street
New York, N.Y. 10010

Insurance Information

CORPORATE INSURANCE MANAGEMENT
5301 Wisconsin Avenue, N.W.
Washington, D.C. 20015
(202) 244-7205

brochures: "Insurance Program for Members of Volunteers Insurance Service" describes the insurance package and contains an application form.

These companies have written policies to cover court volunteers:

VOLUNTEERS INSURANCE SERVICE
Corporate Insurance Management
5513 Connecticut Avenue, N.W.
Washington, D.C. 20015

VOLUNTEER WORKERS BLANKET ACCIDENT POLICY
St. Paul Fire and Marine Insurance Company
St. Paul, Minn.

Foundation Information

Publications (costs are approximate):

Foundation Directory, edition 6.	$35.00
Foundation Grants Index	$15.00

—Order from Columbia University Press—

Foundation Grants Index in *Foundation News.*
—Order from The Council on Foundations—

Foundation Annual Reports on Film.
Comsearch Printouts
—Order from the Foundation Center, New York—

Available at Libraries:

Foundation Catalogue lists over 20,000 foundations by name.

Foundation Files includes philanthropic foundation information returns, Internal Revenue Service Form 990-A (1962-1969) listing officers, assets, grants; foundation reports, newsletters; newspaper clippings.

IRS Forms 990, 990-Ar are indexed on microfilm and microfiche.

Foundation Grants Index lists grant descriptions by State (under foundation name) and/or subject field; indexed by key words.

Literature includes books and articles on philanthropy; reference collection; multiple copies of the *Foundation Directory, Information Quarterly, Foundation Grants Index*, 1970-1972, *Foundation News.* Also available is information on "Seeking Foundation Funds" and "Preparing a Foundation Proposal."

Other Resources

ADULT EDUCATION ASSOCIATION OF THE U.S.A.
810 Eighteenth Street, N.W.
Washington, D.C. 20006

brochures: "Adult Education Publications" describes the publications cited in previous sections of the resources.

"AEA Membership Information" describes the association and its role in field services, legislative information systems, special projects, conferences, and its publications.

publications: "Leadership Pamphlet Series"—individual pamphlets which have been referenced under the "Leadership," "Training," and "Overview" resource sections.

LEADERSHIP RESOURCES, INC.
1 First Virginia Plaza
Suite 344
6400 Arlington Boulevard
Falls Church, Va. 22042
(703) 534-9200

brochures: "Catalogue" describes monographs (complete "Executive Libraries" or individual copies) and training aids concerning management and supervision, listed below.

publications: (The following "Executive Libraries," composed of a series of monographs, were referenced in previous sections of this resource listing. The cost listed below refers to the complete bound set.)

"Looking Into Leadership Series"	$14.50
"The Management Series"	$10.50
"The Management Quiz Kit"	$ 9.50
"The Reprint Series" (see "Training Theory" resource section)	$ 3.60

NATIONAL DRUG ABUSE CENTER, write to:
NATIONAL DRUG ABUSE MATERIALS DISTRIBUTION CENTER
P.O. Box 398
McLean, Va. 22101

NTL LEARNING RESOURCES, INC.
2817-N Dorr Avenue
Fairfax, Va. 22030

brochures: "Publications and Learning Materials," describes many of the materials cited above.

Sample Documents Related to Section II: Exploration Phase

SAMPLE

To be adapted to agency requirements

Planning Committee Checklist

Administrative Implications of a Volunteer Program

Projected Staff Time

Is the agency prepared to

- allocate 1 hour of staff time for 2 to 3 hours of volunteer time in the beginning of the program?
- allocate 1 hour of staff time for 15 to 20 hours of volunteer time when the program is in full operation?
- require participation in weekly or biweekly orientation sessions during the early months of the program?
- allow compensatory time for overtime staff participation in volunteer training and supervision?

Projected Administrator Time

Is the administrator prepared to

- continue to participate directly in volunteer program planning?

If yes, how many times per month?

If no, who would represent the administrator?

- take measures to clarify the coordinator's position, responsibility, and authority to staff; clarify lines of communication; create channels for the coordinator to be informed of staff needs?
- communicate with the volunteer coordinator on the same regular and formal basis as with other staff?
- appear at volunteer training sessions and recognition gatherings as often as 8 to 10 times per year?

Program Leadership

- What special qualifications are necessary in a volunteer coordinator for this agency?
- What position will the coordinator have in the agency (line, staff, reporting to whom)?
- How many hours a week will be required to direct the program during the first year?
- Will this position be paid or unpaid?

If paid, what salary is contemplated and how does this relate to regular staff salary levels and structure? ____________

Will the volunteer coordinator be full time or part time? ____________

If part time, how many hours per week? ____________

If full time, will the coordinator be expected to do other things for the agency such as general public relations? Other? ____________

Is the agency willing to allocate worktime travel and registration fee funds for the coordinator to attend at least two or three training workshops a year to improve leadership skills? ____________

Will the coordinator attend and participate in staff meetings? ____________

Will time be set aside to discuss the volunteer program with staff at such meetings? ____________

Logistic and Budget Support

Will the volunteer program coordinator have secretarial support? Full-time? Part-time? ____________

Can space (a desk, meeting room, and so on) be set aside for volunteer use? ____________

Which of these items must be budgeted for, and how will this be done (e.g., absorb in regular budget, solicit funds, look for in-kind donations and volunteer services)? ____________

mailing ____________

office-supplies ____________

telephone ____________

recruitment/training materials ____________

typing ____________

reimbursement of volunteer work-related expenses ____________

other ____________

SAMPLE

To be adapted to agency requirements

VOLUNTEER COORDINATOR JOB DESCRIPTION[1]

(In County Mental Hospitals)

The volunteer coordinator is subject to the direction of the agency administrator. As this position has both public relations and clinical responsibilities, it is so placed on the hospital's table of organization chart.

Qualifications:

1. Of prime importance in this job is the ability to relate well with others at all social, professional, economic, and ethnic levels both in and out of the institution setting.
2. Ability to supervise others and to stimulate cooperation among all levels of staff who work with volunteers.
3. Ability to speak before groups and write with some ease and skill.
4. Must be flexible and able to cope with countless interruptions and a multitude of telephone, mail, and personal contacts.
5. Honesty, integrity, and tact of the highest order are essential.
6. Community awareness—knowing the area well enough to recognize resources for volunteers and for filling special needs of the patients that cannot be met through regular hospital budgets.

Specific Duties:

1. Assist in policy decisions within the agency regarding use of volunteers and hospital responsibility to volunteers.
2. Assist agency administration in defining role of volunteers.
3. Interpret to the administration various programing ideas and standards relating to volunteer services.
4. Assist in interpreting agency's need for volunteers to the community.
5. Initiate purposeful placement of volunteers in the agency.
6. Initiate purposeful recruitment, selection, and screening of volunteers.
7. Set up orientation programs, educational workshops, and regular recognition programs.
8. Assist agency staff to a better understanding and more purposeful use of volunteer services.
9. Develop written guides and instructional manuals as needed.
10. Accept phone calls and letters of inquiry regarding donations and promptly acknowledge all donations received.
11. Through contact with community groups, assist in the public education regarding the agency's operation.
12. Assist volunteers to a better understanding of their roles and the mission of the agency.
13. Work cooperatively with other community agencies when called upon to do so by the administration.
14. Work closely with hospital administration in setting up annual open house, conduct tours, and submit press releases as deemed appropriate.

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[1] Jorgensen, James D., and Susan K. Bashant. *Volunteer Training Manual.* Denver: State of Colorado Judicial Department, Volunteer Services Coordination Project.

SAMPLE

To be adapted to agency requirements

JOB DESCRIPTION FOR DIRECTOR OF VOLUNTEER SERVICES[2]

The director of volunteer services is responsible to the administrative division. His primary function is to assist the the institution in the delivery of comprehensive health care to the community by obtaining and retaining an adequate number of competent and satisfied volunteers to augment the services of the institution's personnel. As a department manager, he must:

- Plan for space and equipment, develop the budget, and determine the staff required.
- Develop criteria for the assignment of volunteers.
- Develop policies and procedures for the department.
- Develop and maintain records and forms and prepare reports required by administration.
- Continuously survey the institution's needs for volunteers and volunteer services, analyze potential assignments for junior and adult volunteers, and develop job descriptions for all assignments.
- Recruit and interview volunteers; arrange for their placement, orientation, training, and supervision; and ensure that all volunteers and volunteer services are evaluated regularly.
- Maintain a working relationship with the staff and personnel of the institution and the auxiliary, communication with individual volunteers, and contact with community organizations as appropriate.

The director of volunteer services must be able to relate to any person of whatever age, background, skills, and ability. He must have an understanding of human needs, behavior, and motivation, and the ability to develop the capabilities of others. He also must be a skilled communicator and a capable manager and planner.

Although no one field of experience is directly applicable to this position, knowledge of social sciences, business administration, adult education, and personnel administration is particularly helpful.

The person employed as director should also have had experience in a position in which he has demonstrated the desired qualifications.

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[2] American Hospital Association. *The Volunteer Services Department in a Health Care Institution.* Chicago: American Hospital Association, 1973. pp. 5 and 6.

APPENDIX B

Sample Documents Related to Section III: Design Phase

SAMPLE

To be adapted to agency requirements

PROGRAM GOALS THAT DESCRIBE POSSIBLE VOLUNTEER ROLES[1]

Good Grooming Objectives

1. To conduct ongoing patient/volunteer sessions for the development and maintainance of good grooming habits.
2. To bring community interest and concern into an institutional setting, thereby attempting to communicate to the patients that they continue to be members of the human community.
3. To provide the material necessary for basic grooming needs to those individuals for whom such items are unavailable or unaffordable.

Fashion Therapy Objectives

1. To provide a volunteer/patient relationship that is structured, supportive, and caring in a hospital setting. The patient-volunteer relationship, with its emphasis on a sincere human concern, is always the pivotal point on which the entire program is based.
2. To reawaken and/or enhance the patient's awareness of his or her appearance in relationship to the specific plans for a specific patient.
3. To encourage the patient to assume responsibility for personal grooming habits.
4. To explore and invite development of a positive self-concept.
5. To encourage personal choice, i.e., acknowledgement of the individual's need and right to be and look as he or she chooses.
6. To provide material means to work toward the above objectives through cosmetics, clothing, hair styling, and so on.
7. To provide contact with people from the community against whom the patient can see, test, and judge his or her reflections and sense of reality.

SAMPLE

To be adapted to agency requirements

VOLUNTEER JOB DESCRIPTION[2]

Function: To work on a one-to-one basis with young people who are under court supervision or who have come to the attention of the court and to establish a warm, stable, support-friendship relationship.

Responsible to: Volunteer coordinator

Responsible for:

1. Providing an extension of the services offered by regular staff members in an innovative and purposeful manner for the enrichment of the child.
2. Acting in a conscientious and concerned manner relative to the needs of the child, i.e., friendship, support, companionship, and to cooperate with the policy, procedures, and practices of the court.
3. Participating in training sessions, "rap" sessions, and supervisory conferences and striving continuously for growth and development in understanding young people in conflict.
4. Keeping any records required.

Qualifications and Abilities:

1. Must possess maturity and sound judgment; an enthusiastic and healthy philosophy of life; a sensitive and warm personality; emotional and physical stamina sufficient to carry out the task; ability to build a friendship on respect, dignity, and concern; and the ability to keep information confidential except to authorized court personnel.
2. Must enjoy working with troubled children and be willing to continue the work for a period of 9 months, 3 hours per week.
3. Must be of good moral character and have a desire to help others.
4. Must have the ability to be open and honest in relations with others.

Minimum Requirements:

1. Some experience in working with children.
2. A valid Washington State driver's license and insurance to carry passengers.
3. An application with references on file.
4. Completion of orientation and basic training course.

SAMPLE

To be adapted to agency requirements

AFTER-CARE VOLUNTEER PROGRAM—WELCOME-HOME AIDE JOB DESCRIPTION[3]

Purposes of the Program:

1. To provide a volunteer service that will help mentally and/or emotionally ill patients, who are county residents, to make the transition from hospital life to community life. This will be done by offering a human relationship in which nothing is required of the expatient other than his existence and his permission.

2. To be informed of what aftercare facilities are available, viz., outpatient care, medications, social rehabilitation, and other types of services, and keep written records of contacts with these resources which can be used for evaluation purposes.

3. To determine what kinds of resources are needed for returning hospital patients and how well present facilities in the county are meeting these needs. As an outgrowth of this, to pinpoint where and to what extent gaps exist and to help, where possible and feasible, to mobilize the community resources necessary to meet such needs.

Qualifications of the Volunteer:

1. Be able to relate to another human being in a warm, friendly, and accepting manner; care about another person; and provide the support they might need to make their own decisions and reach their own goals.

2. Be openminded about, and interested in, methods of handling problems of living that may not be in accordance with the volunteer's own set of values.

3. Be able to be reasonably comfortable in a work situation in which results of one's efforts may not be apparent for a long time or may never be very clearly evident.

4. Be innovative and creative in the relationship with the patient, as needs become apparent.

5. Be very reliable about fulfilling commitments and be able to make only promises that can be positively be kept and accept only those patient referrals that can be handled with available time and interest.

6. Observe strictly the confidential nature of any information regarding the patient.

7. Be aware of available facilities and/or how to get information about facilities.

8. Be willing to visit the State hospital occasionally to meet the patient shortly before he or she is scheduled for discharge. This is very seldom necessary.

9. Submit semimonthly written progress reports.

10. Attend supervisory meetings, in the county, for 1½ hours, twice a month.

SAMPLE

To be adapted to agency requirements

STATISTICAL REPORT—VOLUNTEER PROGRAM[4]

3d Quarter, July 1 through September 30, 19__

Name of Agency ____

Department Supervisor ______________________________________

I. CLIENT DATA

A. 1. No. of Clients Being Serviced by Volunteers, End of Last Quarter ____________
   2. No. of New Clients Assigned to Volunteers During Quarter ____________
   3. Total Caseload During Quarter ____________
   4. No. of Clients Terminated From Caseload During Quarter ____________
   5. No. of Clients Being Serviced by Volunteers, End of This Quarter ____________

B. No. of Clients Being Serviced Directly by the Volunteer Coordinator During Quarter

C. Of the ____________ clients no longer being serviced by volunteers:
   1. ____________ clients discharged.
   2. ____________ clients transferred (not committed).
   3. ____________ clients no longer need service.
   4. ____________ volunteers left.

II. VOLUNTEER DATA

A. Type of Service	Number of Volunteers	Number of People Receiving Service	Number of Hours Donated Per Quarter
1. Individual Counseling			
2. Tutoring Only			
3. Clerical/Office Work			
4. Group Work Only			
5. Professional Services			
6. Intake Work			
7. TOTAL			
8. Other			

B. 1. Number of New Volunteers Trained During Quarter ____________
   2. Number of New Volunteers Assigned During Quarter ____________
   3. Total Number of Volunteers Trained From Start of Program to End of Quarter ____________
   4. Total Number of Volunteers Assigned From Start of Program to End of Quarter ____________

SAMPLE

To be adapted to agency requirements

VOLUNTEER HANDBOOK[5]

Welcome

The VOLUNTEERS' HANDBOOK

Anoka State Hospital

The VOLUNTEER SERVICES OFFICE . . .

. . . at Anoka State Hospital is in the Basement of the Vail Building in Room B C 30. Volunteers and other visitors may park cars in any of the several nearby parking lots.

The Volunteer Services Coordinator is Richard Bokovoy and he is in charge of the office and of all Volunteer Activities. He is also the Director of Public Relations for the hospital. To reach the office by telephone, call 421-3940 extention 397. The mailing address is, Richard Bokovoy Volunteer Services Office, Anoka State Hospital, Anoka, Minnesota 55303.

We're Glad You're Here

WE AT ANOKA are delighted you Volunteers are here . . . because we couldn't do nearly as much for our patients if you weren't.

You Volunteers bring to the 1200 men and women the Hospital serves each year the flavor of "the real world." The Hospital's staff works hard to give patients the best professional treatment modern science makes possible. But our staff can never be large enough, nor have facilities or time enough, to offer the personal warmth that comes from unselfish human sympathy freely given. This is your contribution.

So, no matter how well we do our jobs, we know that our patients can profit more fully from what we do because of what you do. You help your patient-friends to realize that their stays here are temporary; your example spurs them to confidence in their ability to live without either you or us.

With gratitude and deep belief in what you and we can accomplish together, we welcome you. We are indeed glad you're here.

What Is a Volunteer?

A VOLUNTEER is a patient's friend.

Friendship is the golden quality that Volunteers bring to the Hospital. Patients are often lonely people . . . they're away from home, they're away from families. Volunteers bring them understanding, the chance to talk about things they want to talk about, the savor of the world they will some day go back to. Nothing is more vital to their happiness or their eventual return to health.

A Volunteer is not a trained therapist; but he's more than an amateur. It's fair to call him a semi-pro, for he has to know a lot of things about the best ways to serve his patient-friends. The Volunteer Coordinator at the Hospital arranges orientation programs for new volunteers, and provides materials and counsel to help them do their jobs well.

This booklet is one such aid (on the page next to the back cover is a list of books that Volunteers will find helpful).

What do Volunteers do? Later in these pages you'll find some detailed suggestions. In general, they provide services to patients that the regular staff hasn't time to offer, services that usually must come from "outside." They visit their patient-friends; they help patients to make "outside" contacts, perform "outside" errands. They observe what the Hospital is doing (their suggestions often help the staff to do things better). They provide the "extras" that mean so much to men, women, and children in an institutional setting.

This booklet tells new Volunteers what they need to know to become good Volunteers. Read it, and keep it at hand.

ANOKA'S VOLUNTEER PROGRAM

MANY AMERICAN HOSPITALS—like Anoka—conduct volunteer programs as a continuous part of their service to patients. The purpose of these highly organized efforts is to make sure that the generosity of "outsiders" is used to best advantage. Under the carefully-guided system, their services are always those requested and needed in one part of the Hospital or another. The program helps the non-professional friends of the hospitalized to pool their efforts—to make sure by working in carefully planned ways that their concern for their fellows will be made most effective.

At Anoka Volunteers contribute efforts through the Volunteer Services office, Vail Building. Here the Volunteer Coordinator meets them, gives them training, plans activities for them, channels their services so that all Hospital areas are reached and none neglected. The Coordinator's office is responsible as well for recruiting Volunteers, for keeping records of their work, and for the awards that recognize their meritorious contributions.

The Coordinator also seeks and organizes the services of groups of Volunteers—church groups, service club groups, school groups, many other community groups that want to contribute to the Hospital's work. Some 40 groups involving more than 500 members participate each year in the program. Besides these, there are many individual Volunteers.

Orientation sessions conducted by the Coordinator provide both training sessions sessions for new Volunteers and an annual conference, usually in the fall, for all individuals and groups in the program. Sessions for individuals involve tours of the Hospital and instruction in its purposes and the many phases of its work. The annual conference usually offers talks by doctors, nurses, and others of the Hospital staff and personal accounts of experiences by the individual Volunteers.

Many groups or individuals make financial contributions. All checks or money orders should be made payable to the Anoka State Hospital Volunteer Council Fund. This money is used not only at Christmas time, but through out the year for the benefit of the patients or for special projects for which there is little or no provision in the regular hospital budget.

The Volunteer Services Office accepts and distributes many gifts for the patient's benefit. You may ask the Volunteer Services Office to discuss with you the needs of the hospital. The gift program goes into high gear at Christmas, when gifts pour into the Volunteer Services office from groups and individuals. The office at this season looks like a big bazaar, and it serves every patient.

Finally: Certificates of merit are awarded every two years to individuals to recognize faithful Volunteer service. A Volunteer must have made at least four visits in a year to the Hospital to become eligible for a certificate.

What Does a Volunteer Do?

THIS QUESTION has no complete answer, and no permanent answer. For one answer is "almost everything," and another must recognize that patients' needs which Volunteers can meet today are different from yesterday's, and that tomorrow they will change again. Volunteers' activities and contributions to Anoka patients are as varying as the world itself.

It is possible to say clearly, however, that there are some kinds of activity Volunteers are not asked to undertake. They are not therapists—they do not provide the technical services the trained staff offers. They do not assist in the administrative and managerial tasks of the Hospital. They are considered supplements—precious supplements—to Hospital services, for they bring human and personal relationships into the sometimes formalized institutional life of patients.

What are specific Volunteer contributions?

Group activities (which involve the largest number of Volunteers and the largest number of patients) are of a hundred kinds. Examples:

> Church groups bring choirs for patient entertainment. Other groups arrange trips for patients to such places as the Como Zoo; they organize picnics for patients; they come to the Hospital to provide both partners and music for dances (some of these activities are occasional, some repeated on regular schedules). They may take patients in small groups to Viking or Twins games, to the Guthrie Theatre or other theatres, to libraries or art galleries or concerts. They provide Christmas cookies for Christmas parties; they hold rummage sales to support the Volunteer Fund; they send members for ward service as nurse's aides or orderlies. They take responsibility for baking birthday cakes (in one year eleven church groups constituting the "Birthday Club" contributed 661 individual birthday cakes to 661 individual patients). They come to the Hospital on July 4 and other holidays to put on recreational programs. They aid with the Christmas Open House. They take patients to Aquatennial or Winter Carnival events.

All such activities are planned in consulation with the Volunteer Coordinator. Sometimes suggestions move from the Coordinator to groups, sometimes the other way. But all plans are approved by the Coordinator.

Individual Volunteer activiites are planned and coordinated in the same manner, and many of them are like group-sponsored activities: Work in wards under nurses' supervision, for example. Individuals undertake scores of other services, however. An individual may accompany a patient on a shopping trip to Anoka or the Twin Cities. He may take a young patient for a visit to his own doctor. He may help patients to use the Hospital library. He may assist an occupational or rehabilitation therapist. He may play golf with a patient, or go with him for a walk along the Rum River, or aid him in letter-writing.

Individual Volunteers may serve on a regular basis—once a week, once a month, more often or less—or he may serve "on call." Volunteers in nearby communities are available on days they specify to accompany patients to other hospitals, nursing or boarding homes, or off-the-grounds appointments (the Hospital provides cars and drivers), thus avoiding taking regular employees off duty.

More and more important in the Volunteer scene is the One-to-One program so widely employed recently in America in treatment of the mentally ill. Under One-to-One, a Volunteer responds to a Hospital request for an individual to establish a relationship with an individual patient. In its most intensive application, the One-to-One relationship often involves a weekly visit by the Volunteer to "his" patient; he is supervised carefully in his relationships and activities, though he learns not to confuse the friendship relation with therapy. His purpose is to provide to the patient as intimate and sympathetic a contact as is considered helpful; he becomes friend, adviser, confidant as well as a living link to the outside-the-Hospital world.

One-to-One Volunteer relationships on a less intensive basis—perhaps one contact a month—are also common, usually through Volunteers assigned to Anoka by units of the Minnesota Association for Mental Health.

Volunteers always serve under the specific direction and supervision of the head or supervisor of the department to which they are assigned: a nurse, a therapist, a medical officer, a social worker. The Volunteer Coordinator is not looked to for specific supervision, but rather for initial training and assignment.

The Responsibilities of Volunteer Service

MOST VOLUNTEERS become Volunteers because theya re moved by what Dr. Francis J. Braceland has called "the highest human value, man's concern for his brother." Volunteers at Anoka are men and women, young and old, who dislike inequality of opportunity and condition, and who find contribution to others' welfare more satisfying than personal convenience.

Most of those who become Volunteers are aware that the service they are about to offer entails both obligations and rewards. About the rewards this booklet will say little—they multiply as service continues. But some of the obligations are not always at first visible. Let's talk about them.

Acceptance of Responsibility a "good" Volunteer knows that dependability is primary. Not only the Hospital but even more the patient must know that a Volunteer is as good as his word: That when he says he will visit a patient regularly, he will do so; that when he promises to escort a patient on a shopping trip, his car will be at the right door at the right time. Hospital procedures will suffer, perhaps only a little, if he fails; but a rift in the confidence of a patient is not easily mended.

Friendship, not Charity The essential gift of a Volunteer to a patient is friendship, generously and warmly offered. Patients in a hospital are uprooted people, people drawn out of the lives and the families they know. "Their" Volunteers may be their only contacts with the world they have left; more than anything, they need to find in these contacts the assurance of a kindred human's interest in their welfare.

America knew a time when dedicated citizens believed that they had met the needs of those less fortunate when they had made their annual contribution to charitable or service enterprises. Today we know this is not enough. Support of service organizations is vital. But no check, whatever its size, will mean as much to, or do as much for, a Hospital patient as a hand-clasp and the security that a "see you next week" is a guarantee, not a mere courtesy.

The Patient's Privacy A basic tenet of all of the helping professions—medicine, the clergy, law, social work, and others—is that relationships between the needful and the helpers are confidential By the very nature of Volunteer-Patient intimacy, a Volunteer gains insights into the secrecies of the lives of his patient-friends, certain kinds of knowledge about them, that must not be revealed. Volunteers bear as much burden as do members of the professional staff to protect the right of patients to live in self-respecting privacy.

The Use of Guidance As this booklet pointed out earlier, Volunteers are not expected to be doctors, nurses, or therapists. They serve another function, one that staff doctors, nurses, and therapists rarely have time to perform. Moreover, Volunteers—even should they happen to be professionally equipped—are not in charge of treatment plans, and they don't usually have full information. Consequently they are expected to model their relationship with patients according to the guide-lines or instructions provided by the supervisors of departments to which they are assigned. Not to do so might seriously interfere with patient progress.

How to Become a Volunteer

VOLUNTEERS at Anoka State Hospital work under several plans, as this booklet has already told you.

If you are a member of a group—a church group, a civic or luncheon club, a social group—interested in contributing to the welfare of people who need you, you can interest the group in arranging to sponsor a program at the Hospital. To do so, you consult the group (usually of 10 to 25 members) to make sure that all are in position to devote time to the activity (amounts of time given by different groups vary widely, from a few hours a month to regular weekly visits). You then telephone or visit the Volunteer Coordinator, BC 30 Vail Building (telephone 421-3940, Extension 397). You will arrange appointments for interviews with the Coordinator, who will then assign your group to a service requested in some area of patient care and schedule the necessary orientation and training sessions.

If you wish to serve as an individual, apply to the Coordinator and arrange for an interview. After the interview you will be given an assignment on which you agree. You will begin your service following orientation.

Full records of your seravice will be kept at the Coordinator's office—your registration form, your assignments, your hours of work. It is a Volunteer's responsibility to see that hours are recorded.

(If you live nearer one of the other State hospitals than Anoka, you may wish to volunteer for service there. The other mental hospitals are at Fergus Falls, Hastings, Moose Lake, Rochester, St. Peter, and Willmar; facilities for the mentally retarded are at Brainerd, Cambridge, Faribault, Minnesota Valley, Owatonna, and Shakopee.)

BOOKS for VOLUNTEERS

VOLUNTEERS—and everybody who wants to understand mental health and illness—will find exploration among the books named below a fascinating and helpful adventure. Many of them "read like novels." All are worth anybody's time.

Beers, Clifford W., A MIND THAT FOUND ITSELF (Doubleday, 1953)

Bird, Brian, TALKING WITH PATIENTS (Lippincott, 1955)

Dennis, Lorraine, PSYCHOLOGY OF HUMAN BE+HAVIOR FOR NURSES (Sanders, 1962)

Goffman, Erving, ASYLUMS (Doubleday, 1961)

Green, Hannah, I NEVER PROMISED YOU A ROSE GARDEN (Holt, 1964)

Hackett, Paul, CARDBOARD GIANTS (Putnam, 1952)

Hoffman, Peggy, A FOREST OF FEATHERS (Harcourt, 1966)

Jones, Maxwell, THE THERAPEUTIC COMMUNITY (Basic, 1953)

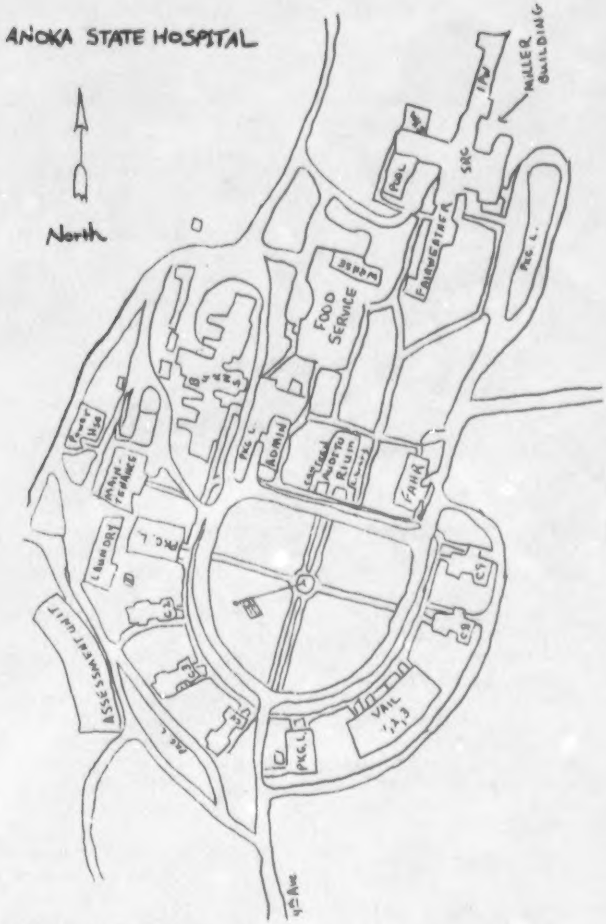
Jones, Maxwell, BEYOND THE THERAPEUTIC COMMUNITY (Basic, 1968)

Kaplan, Bert, THE INNER WORLD OF MENTAL ILLNESS (Harper, 1964)

Menninger, Karl, LOVE AGAINST HATE (Harcourt, 1942)

Robinson, Alice, THE UNBELONGING (MacMillan, 1958)

Wilson, Louise, THIS STRANGER MY SON (Putnam, 1968)


ANOKA STATE HOSPITAL
North
MILLER BUILDING
SRC
POOL
FAIRWEATHER
PKG. L.
FOOD SERVICE
BURNS
Power Hse
MAIN-TENANCE
PKG. L.
ADMIN
FAHR
LAUNDRY
PKG. L.
C7
C8
VAIL 1,2,3
PKG. L.
ASSESSMENT UNIT
PKG. L.
4th Ave

SAMPLE

To be adapted to agency requirements

INTERVIEW LOGISTICS CHECKLIST

Before the applicant arrives, the following items should be reviewed to ensure that the interview will take place in a comfortable, nonthreatening environment and that the interviewer is well-organized and prepared for the meeting. Before applicant arrival, the interviewer should determine which of the items below are applicable to his/her program.

1. Will there be someone to greet the applicant and, if necessary, administer the proper forms?	Receptionist	____
	Refreshments: (coffee, tea, creamer, sugar, cups, etc.)	____
	Writing table and pencils	____
	Forms:	
	application	____
	sign-in sheet	____
	choice sheet	____
	references	____
2. Is there a comfortable place for the interview?	Adequate furniture	____
	Temperature	____
	Private, quiet room	____
	Well-lit	____
	Clean (but not sterile)	____
3. Has the interviewer: reviewed all available applicant information? become familiar with program goals and objectives? gathered the forms he/she must complete during the interview? jotted down questions to be asked during interview? have all necessary information at his/her disposal during the interview?	Interview guidesheet	____
	Job description	____
	Copies of information and response sent to applicant	____
	Application form references choice sheet	____
	Agency referral file	____
	Schedule of orientation and training	____
	Volunteer-agency contract	____
4. If the applicant is to be given a tour of the facility or agency, has the rest of the staff been notified?		

SAMPLE

To be adapted to agency requirements

COMMUNITY RESOURCE REFERRAL FILE
(to be updated periodically)

Name of Agency: ______________________________

Address: ______________________________

Telephone Number: ______________________________

Contact Person: ______________________________

Type of Agency (briefly describe, e.g., alcohol residential treatment center): ______________________________

____

How to Refer Applicants: ______________________________

____

Kinds of Volunteers Needed at Agency: ______________________________

Feedback (describe agency receptivity to volunteers and note date and source of feedback): ______________________________

____

(Include any updates on back of card.)

SAMPLE

To be adapted to agency requirements

VOLUNTEER INTERVIEW GUIDESHEET

Date: ____________________

Time interview begins: ____________________

Applicant's Name: ____________________

Desired Position: ____________________

Relevant information about applicant that is not included on application form:

- Experience: ____________________
- Interests: ____________________
- Other: ____________________

Time interview ends: ____________________

To Be Completed After Applicant Leaves

General comments/reactions (include how applicant relates to you and he/she responds to questions): ____________________

____

____

Recommendation:

Accept ________

Refer to another agency ________
(Specify name of agency) ________
____

Refer to another individual
within this agency ________
(Specify
name) ____________________

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Explain recommendation if not incorporated into general comments: ______________________________

____

____

Suggested assignment (include days and shift): ______________________________

Interviewer's signature: ______________________________

SAMPLE

To be adapted to agency requirements

LOG OF VOLUNTEER PHONE INQUIRIES

(to be noted as received)

DATE	INQUIRER'S NAME/ADDRESS	VOLUNTEER CATEGORY 1 Individual volunteer 2 Group service 3 Special contribution 4 Donor	ACTION TAKEN 1 Application mailed 2 Interview scheduled 3 Referred to individual within agency 4 Referred to another agency

SAMPLE

To be adapted to agency requirements

INVITATION TO INTERVIEW[6]

Dear ______________________:

Thank you for your interest in the Mental Health Association of Montgomery County Volunteer Corps. I hope the following information will help you decide if you wish to apply to the Corps.

Volunteer Corps training comprises 35 hours of generalized instruction and 10 hours of specialized skill training and meets twice a week for 4 weeks. The training program is conducted by a variety of mental health professionals. It is geared for those interested in becoming volunteers actively engaged in unique helping relationships with hospitalized and formerly hospitalized mental patients.

We have no educational requirements for volunteers; rather we look for individuals who exhibit the ability to be comfortable, caring, and nonjudgmental with persons suffering from varying degrees of mental illness. A personal interview is required for all applicants and all applicants must agree to:

- become a member of the Mental Health Association.
- give a minimum of 100 hours per year in service (training time included). These will include also a minimum of 50 hours' service at Springfield State Hospital, in Sykesville, Md., or one Remotivation Program Series.
- make a 2-year commitment to the Corps.
- take 35 hours' general training and up to 20 hours of specialized training.
- purchase any required training materials. (Cost will be $5.00.)

As an initial placement, it is recommended that new Volunteer Corps members participate in the Remotivation Program as their beginning commitment to Springfield State Hospital. We suggest this as a first placement for three reasons:

1. to provide a structured experience for new volunteers,
2. to acquaint the volunteers with the hospital system and the volunteer's role within that system and,
3. to ensure that as many of the hospital patients as possible can receive the volunteer-sponsored Remotivation Series, which is now considered an essential component of the hospital's rehabilitation program.

Following the 50 hours' commitment to Springfield State Hospital, volunteer opportunities include Patient Sponsorship, the Welcome-Home Aide Program, and/or participation in various County Mental Facility Programs, all of which will be fully explained during the training. With the exception of the patient sponsor unit, these placements operate in Montgomery County and become available according to need.

If you are interested in exploring your volunteer possibilities in this program, please call the MHAMC office (949-1255) to arrange for an interview. For those interested in an evening training program and placements, evening interviews can be arranged. The enclosed application should be completed and brought with you at the time of the interview.

I look forward to meeting you and discussing the Volunteer Corps program with you. Thank you again for your interest.

Sincerely yours,

(Signature)
Volunteer Coordinator
Volunteer Corps

SAMPLE

To be adapted to agency requirements

VOLUNTEER APPLICATION FORM[7]

Name ____ Occupation ____

Address ____ Zip ____ Phone ____

Name of spouse ____ Spouse's occupation ____

____

Place and date of birth ____

Number of children ____ Ages ____

Schools attended ____

Degrees, certificates, etc., and when obtained ____

____

If a college graduate, what was your major? ____

Experience as a paid employee ____

____

Experience as a volunteer ____

____

What training, if any, have you had related to the field of alcoholism?

____

____

____

What are your special interests, skills, hobbies, etc.? ____

____

(continued next page)

Application Form (cont'd)

How many hours can you serve weekly, and what hours do you prefer, on what days of the week? ______________

How flexible is your schedule? ______________

Do you have your own transportation? ______________

Would you be willing to provide transportation to clients and their families? ______________

How did you learn about this program (if through newspaper, please specify) ______________

What attracts you to this program? ______________

How do you feel about:

a. working in an alcoholism agency? ______________

b. working with alcoholic people? ______________

Which community group affiliations have been important for you?

Please specify.

Church ______________

PTA ______________

Service groups ______________

Professional groups ______________

Youth organizations ______________

Numbers to contact in an emergency:

Spouse's business telephone: ______________

Individual other than spouse: ______________

Name ______________ Phone ______________

Application Form (cont'd)

Address ______________________________ Zip __________

Relationship ______________________________

Please list three personal references:

	Name	Address	Phone
1.			
2.			
3.			

Indicate the areas of involvement that interest you:

Administrative:

accounting ____

filing ____

typing ____

fundraising ____

planning ____

other ____

Counseling ____

Occupational therapy ____ (specify) ______________________________

Public relations/ publicity ____

public speaking ____

speech writing ____

speakers bureau ____

other ____

designing pamphlets, etc. ____

news releases ____

radio spots ____

photography ____

Crafts/artistic ____ (specify) ______________________________

SAMPLE

To be adapted to agency requirements

NOTICE OF ACCEPTANCE/INVITATION TO ORIENTATION[8]

Dear ____________________:

Congratulations and welcome to (name of agency)'s volunteer force. We are delighted to have you join us and will do our best to help you have a satisfying and rewarding experience. The next step in your volunteer experience will be orientation. You'll meet our staff, tour the facility, discuss program policies and confidentiality regulations, and receive pretraining information. We are confident that the presentation at the orientation will prepare you for the upcoming training. We look forward to seeing you at (time), on (date) at (place).

Sincerely yours,

(Signature)
Volunteer Coordinator

SAMPLE

To be adapted to agency requirements

NOTICE OF REJECTION/REFERRAL[9]

Dear ________________________:

I want to thank you again for your interest in our Volunteer Corps. One of the most positive aspects about our program is the response we get from caring individuals such as yourself.

Because of the nature of the volunteering we ask our graduates in [illegible], we are not always able to accept all those who apply. We earnestly try to make assignments compatible with individual interests and talents.

Your application is being kept on file, as we will certainly let you know of any additional volunteer opportunities in the field of mental health which might be appropriate in view of your specific background and qualifications. In the meantime, you might find one of the volunteer opportunities listed in the attached sheet of interest to you.

I appreciate your efforts in applying to our Volunteer Corps; I'm just so sorry that we can not use all of the excellent applicants who responded.

Sincerely yours,

(Signature)
Volunteer Coordinator
Volunteer Corps

SAMPLE

To be adapted to agency requirements

AGENCY–VOLUNTEER CONTRACT[10]

Date: __________

Between ____ , and
(name of agency)

____ :
(name of volunteer)

The agency agrees to provide the volunteer with education and training to prepare the volunteer for his/her service, an assignment both useful and satisfying, acceptable working conditions, and acceptance by both clients and staff as a member of the agency team.

The agency agrees to provide a 2-month probationary period before granting permanent volunteer status, supervision, periodic evaluation, inservice education, and change of assignments as appropriate.

The volunteer agrees to carry out assignments to the best of his/her ability, following the agency's guidelines and respecting both clients and staff as members of the team.

The volunteer will use structured channels of communication exclusively to report problem situations, to request consultations or a change of assignment, and to provide feedback and suggestions. He/she will strictly observe the timeframe for his/her assignment, and report well in advance when he/she must be late for or miss an appointment.

The volunteer will respect the dignity of the client and the integrity of the agency by maintaining confidentiality of information received in the course of service.

(Signed) ______________________________
Volunteer coordinator

(Signed) ______________________________
Volunteer

SAMPLE

To be adapted to agency requirements

VOLUNTEER BILL OF RIGHTS[11]

1. The right to be treated as a coworker—not just as free help, not as a prima donna.
2. The right to a suitable assignment with consideration for personal preference, temperament, life experience, education, and employment background.
3. The right to know as much about the organization as possible—its policies, its people, its program.
4. The right to training for the job—training thoughtfully planned and effectively presented.
5. The right to continuing education on the job as followup to initial training, information about new developments, and training for greater responsibility.
6. The right to sound guidance and direction by someone who is experienced, well informed, patient, and thoughtful, and who has the time to invest in giving guidance.
7. The right to a place to work; an orderly, designated place, conducive to work and worthy of the job to be done.
8. The right to promotion and variety of experiences, through advancement to assignments of more responsibility, through transfer from one activity to another, through special assignments.
9. The right to be heard, to have a part in planning, to feel free to make suggestions, and to have respect shown for an honest opinion.
10. The right to recognition in the form of promotion and awards, through day-to-day expressions of appreciation, and by being treated as a bona fide coworker.

SAMPLE

To be adapted to agency requirements

VOLUNTEER PROGRAM AND TRAINING DESIGN–THE COTTAGE PROGRAM[12]

Agency Overview

The Cottage Program is a community-based, family-oriented treatment program for families with alcohol abuse related problems. It is further a primary education, prevention, and early intervention program dealing with attitudes and reinforcive behaviors that perpetuate substance abuse.

The treatment modality functions in relative simplicity. The nondrinking members of a family are involved in a two-part series of the Cottage meeting process. In an informal family meeting, the Cottage meeting moderator confronts the **illness of denial** (the primary aspect of alcohol abuse) with the family. The family is given specific tasks in terms of behavior change related to the unhealthy drinking behavior and a thorough recognition of self-responsibility in the perpetuation of the problem. In an approximate 1-week period, the family participates in the second Cottage meeting wherein the reinforcing roles each nondrinking member is playing are exposed and discussed. Specific behavior changes as a means of ending the self-sustaining cycle are initiated, coupled with emphasis on the necessity for focus directed away from the drinking member and onto self.

This completes the two-part Cottage meeting process, and although a moderator may meet with a family a maximum of six times, we are not in the business of long-range family counseling. The skills needed by a family to deal effectively with its own abusive drinking problem are adequately imparted in this two-part process. Families or an individual may, however, participate in the program series as many times as they wish.

The Cottage accepts program participants from a variety of resources, including direct referral from other agencies. There is no fee to participants or referral source. Our primary objective is to reach as many people as possible and break the cycle of perpetuation of alcohol abuse. There are no screening criteria for program participants. If a participant, after the cottage meeting process, is in need of extended or long-range treatment, appropriate referral is then made.

Please feel free to visit the Cottage and further explore the possibilities of direct referral. We welcome the opportunity to meet with you and to share our program as a meaningful resource to your agency and to yourself as an individual.

SAMPLE

To be adapted to agency requirements

VOLUNTEER TRAINING

Volunteer training is an often overworked phrase and a generally misunderstood concept. Quite simply, it is the process by which unpaid and, theoretically, untrained individuals become integrated into the process and design of a program. It will provide the volunteer with adequate information and skills to be able to function within the program in a manner that is positive and enhancing for both the volunteer and the program. It will be relevant, enlightening, and motivating to the volunteer and potential volunteer experiences. Specific training in basic communication and human relations skills is essential to volunteer performance in human services oriented programs. Clearly, it can and will have a significant impact on the volunteer's program performance, but perhaps even more important, on his personal level of functioning.

The Cottage Program volunteer training program attempts to provide these skills at the very minimum. Over and above these preliminary skills and program orientation, it will attempt to provide a comprehensive advanced training process by which a volunteer may further develop his skill level. The Cottage Program volunteer training program also has a built-in structure to enable volunteers to become effective trainers.

The ultimate goal of the training process is to provide a vehicle that will maintain continued program relevance and that will ultimately be designed and executed by the volunteers themselves. The process for the development of a total volunteer program to be initiated and administered by volunteers is the goal. The initial training experience, in conjunction with the advanced training experience, is designed and implemented toward fulfillment of this goal.

Volunteer Role Statement and Structure

The concept of the volunteer is critical in the Cottage Meeting Program. Volunteers are unpaid people who are able to give limited time to be of help in something that they deem worthwhile and personally rewarding. They bring with them a variety of resources, interests, and personal areas of expertise. The program must be sensitive to these common denominators of volunteerism and design its volunteer structure to be adaptable. The Cottage Program has adopted a volunteer hierarchy that provides a structure and framework through which volunteers may function and progress.

The role of the volunteer is multifaceted. Without the volunteer, some of the very real needs of the program participants might never be met. The volunteer provides an intermediary step between the participants and the program itself. Volunteers are trained to fulfill the role of moderator and volunteer trainer as well as several other roles. The volunteer, through his warm, nurturing, and accepting approach to participants, provides a very necessary element to creating and sustaining the healthy environment in which the staff's related roles may be best complimented.

The Cottage Program volunteer system will soon develop into an autonomous organization that works in conjunction with the program staff, ensuring continued program relevance and continuity. The process for this transition has already been implemented and is ongoing. In the interim, however, efforts are being made to provide the programmatic and supportive services essential to a successful volunteer program.

SAMPLE

To be adapted to agency requirements

NEIGHBORHOOD WORK

Neighborhood Work is the most vital part of the Cottage Program. This is where we experience the real stigma, myths, and denial of alcoholism that are so prevalent in all our communities.

For years we have been treating the illness of alcoholism with programs that focus on treating the alcoholic. These programs are highly commendable, but alcoholism still remains the number one health and social problem in this country. Our present treatment programs don't even begin to keep pace with the illness. We can all sit on our hands for the rest of our lives fantasizing about the nice things we are going to do. But what we need now is ACTION—ACTION directed toward the people in our own community, for it is in our communities that we find the fertile soil where the seeds of alcoholism grow into full blossom. There we find the one who is that person we call the "alcoholic."

The Cottage Program is the only program today that is working to solve the problem by actually going into the neighborhoods—talking with people, delivering information, and holding Cottage Meetings to educate people about alcoholism.

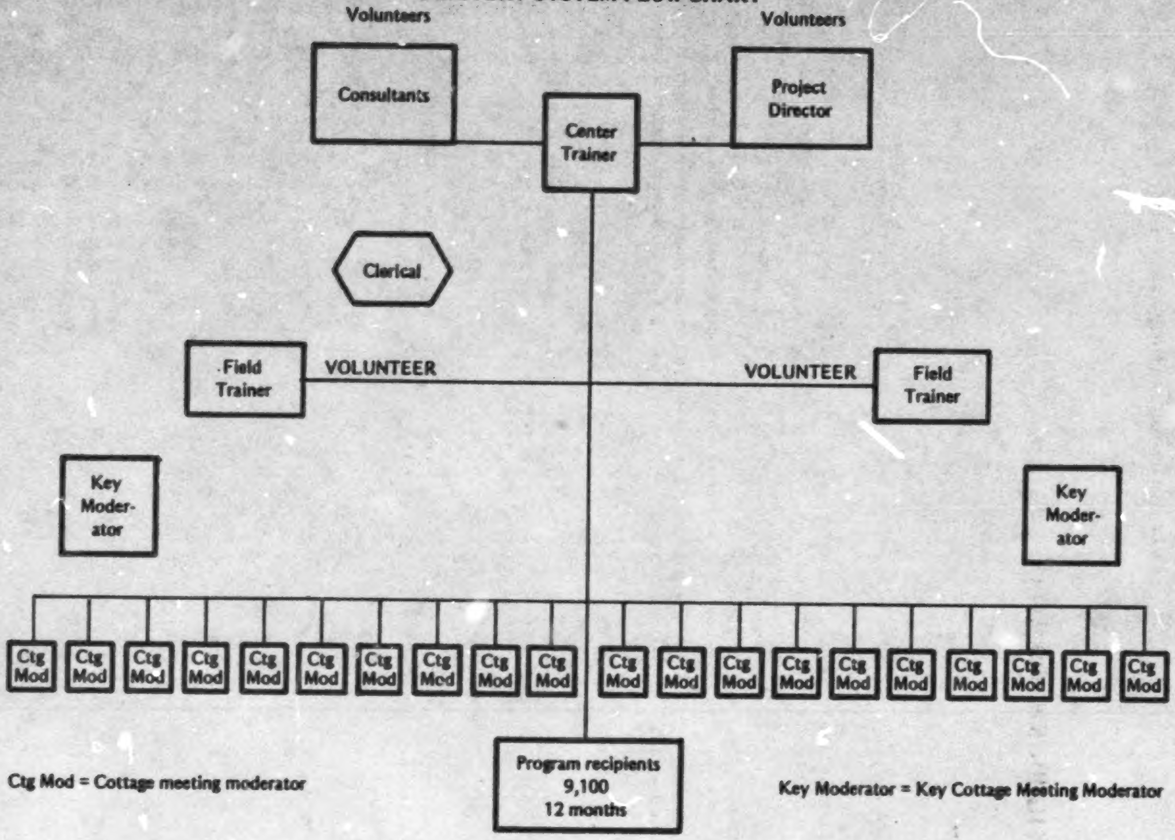
The Cottage Program is a people program, and the heart of it is the Beautiful Volunteer. These are the people who want to become helpers and given human nourishment to other people in our community, whether they drink or not.

We all need to change our attitude toward the use of alcohol, if we are going to whip the illness of alcoholism.
The problem is ATTITUDE:
The answer is EDUCATION FOR AWARENESS . . .
awareness for CHANGE . . .
change for PREVENTION.

We need to treat the illness of alcoholism as we treat malaria. Let's stop running around swatting the mosquito when the swamp is still infested. LET'S TREAT THE SWAMP.

(Signature)
Volunteer Trainer

SAMPLE
DELIVERY SYSTEM FLOW CHART


Volunteers
Consultants
Volunteers
Project Director
Center Trainer
Clerical
Field Trainer
VOLUNTEER
VOLUNTEER
Field Trainer
Key Moder-ator
Key Moder-ator
Ctg Mod
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Ctg Mod
Ctg Mod
Ctg Mod
Ctg Mod
Program recipients
9,100
12 months

Ctg Mod = Cottage meeting moderator

Key Moderator = Key Cottage Meeting Moderator

SAMPLE

To be adapted to agency requirements

INITIAL VOLUNTEER TRAINING

Cycle I

10:00 a.m. or 7:00 p.m.	Training begins Orientation and award description Fill out locator card and pretest 1. Volunteer information sheet Discuss Cottage approach and modeling Outreach methodology 1. Need to educate the community; statistics 2. Door-knocking concept (sheet) Door-knocking in neighborhood Critique experience 1. Turn in and complete locator cards 2. Describe locator card system
Materials needed:	Governor's letter Locator cards, mail-in cards Awareness sheets Door-knocking sheets

Cycle II

10:00 a.m. or 7:00 p.m.	Training begins Overview of Cottage Program 1. Denial handout and discussion 2. Assign stage and reacting role memorization Door-knocking in neighborhood Critique experience 1. Complete locator card system Volunteer time service reports 1. When to complete and turn in 2. Replace yourself through all growth chart phases Assign comoderator of Cottage Meeting No. 1
Materials needed:	Governor's letter Locator cards, mail-in cards

Cycle III

10:00 a.m. or 7:00 p.m.

Training begins
Delivery system handout and presentation
Related dependencies discussion
Door-knocking in neighborhood
Critique experience
1. Complete system
Assign comoderator of Cottage Meetings No. 1 and No. 2

Materials Needed:

Governor's letter
Locator cards, mail-in cards

Cycle IV

10:00 a.m. or 7:00 p.m.

Training begins
Written questionnaire for knowledge gain
Illness of denial, related dependencies
Door-knocking in neighborhood
Critique experience
1. Complete system
Assign crisis intervention training

Materials needed:

Governor's letter
Locator cards, mail-in cards

Cycle V

10:00 a.m. or 7:00 p.m.

Training begins
Volunteer-moderator assists in volunteer training
Cycle begins again
Door-knocking in neighborhood
Critique experience
1. Complete system
Assign:
Extended crisis intervention training
Expanded knowledge of alcoholism

Materials needed:

Governor's letter
Locator cards, mail-in cards

SAMPLE

To be adapted to agency requirements

THE COTTAGE PROGRAM AWARENESS SHEET

The Cottage Program is a way for families to solve drinking problems in their homes. In fact, it is one of the few programs for the family of the drinker in the United States today. At the same time, the Cottage Program involves the entire community through education, prevention, and early intervention. The program works because it recognizes that alcohol abuse is a social illness. It always involves two or more people, never just the drinker in isolation. By affecting the environment around the problem drinker, the problem itself can be affected.

Changing the environment around the drinker means changing attitudes and behavior in the family and the entire community. The first step is education because education creates awareness, awareness creates change, and change in attitudes and behavior leads to the prevention of alcohol abuse. Very simply, if we change our behavior, we change the behavior of those around us. If the community changes its behavior by recognizing alcohol abuse as a social illness, by learning the facts, rather than the myths about alcohol abuse, and by removing the crippling social stigma it attaches to alcoholism, then behavior of others will change. People with potential drinking problems will, therefore, be able to seek and receive knowledge and help. It takes all of us to combat the social problem of alcohol abuse.

The Cottage Program has been operating in the Salt Lake area since February 1972 and plans to extend into other areas of the State. We welcome interest in our program and invite you to visit or telephone for more information.

SAMPLE

To be adapted to agency requirements

COTTAGE PROGRAM DOOR APPROACH

A. Materials
   1. Governor's letter
   2. Locator card

B. Attitude
   1. Warm, friendly, smiling

C. Introduction
   1. "I am ____________, a volunteer from your neighborhood Cottage Center."
   2. "We're talking to everyone in your neighborhood about our program dealing with education and prevention of alcohol abuse."
   3. "Here is a letter from the Governor introducing our program."

D. Allow time to read the letter

E. What are your feelings about alcoholism?

F. Would you like some free information about our program and how it works?

G. Complete locator card—front and back.

SAMPLE

To be adapted to agency requirements

COTTAGE PROGRAM RECRUITING LETTER

Dear Resident:

Our community is faced with a very real and immediate crisis. The illness of alcoholism is having a far-reaching effect on ALL of us. Substance abuse has no respect to age, nationality, or sex; it can touch all walks of life.

One out of five Utahans is directly involved in alcohol abuse and four out of five people of this State are indirectly affected by our Nation's major health problem. The effects of this problem are astronomical and, ultimately, we bear the costs.

Something CAN be done about the epidemic growth of alcohol abuse. As a responsible citizen of this community, YOU can help. An exciting alcohol abuse prevention program has been developed which has enabled thousands of people to understand and significantly reduce the problem of alcohol abuse. This is accomplished by working with people in their homes and neighborhoods. The Cottage Meeting Program is located in your area, and I urge your support to help defeat the tragic occurrence of substance abuse.

I am asking that you join us in learning how we can begin to defeat this crippling problem by giving a brief portion of your time to this much needed effort.

Sincerely,

Governor of Utah

SAMPLE

To be adapted to agency requirements

DELIVERY OF INFORMATION PACKAGE—PRE-COTTAGE MEETING

1. Telephone—(example) "Hello, Mrs. _______________, this is _______________ from your local Cottage Center. We are going to be in your neighborhood on (give date), and we would like to drop off the information that you requested at this time.

2. Packet delivery—(warm and friendly) "Hello, Mrs. _______________, I am _______________, a volunteer from your Cottage Center. Here is the information you have requested." Conversation should then focus toward personalizing the alcoholism problem to this individual by using the examples below. (Use the words "You feel")

Response Examples

   a. "You feel concerned because alcoholism is a real problem in our community."

   b. "You feel upset because you haven't been able to help these people."

   c. "You feel disturbed because you cannot help and you would like to."

3. Setting up Cottage Meeting--"There is a great deal *you* can do and, in doing so, be of great service to your community." Set up Cottage Meeting at this time: "From the interest you have shown, I am sure you would like getting together some of your relatives, friends, or neighbors for an educational Cottage Meeting either in your home or at the Cottage Center here in your area.

IMPORTANT: Set tentative date at this time.

SAMPLE

To be adapted to agency requirements

COTTAGE MEETING I

The materials that you will need to take with you are: Locator Cards, Prequestionnaires, Myth and Fact Sheets, Illness of Denial Handouts, A Merry-Go-Round Named Denial pamphlet, and Guide for the Family of the Alcoholic pamphlet. These materials can all be found on the supply shelves.

Always arrive at the home 5 minutes early, introduce yourself to the hostess, and address each member of the group individually.

Begin the meeting by setting the climate in the group. Create an open, warm, and friendly atmosphere. Distribute the locator cards and explain that they will receive a 1-year, prepaid subscription to the Utah Alcoholism Foundation Newsletter.

Pass out the prequestionnaire, explaining that its primary purpose is to determine the group's attitudes regarding alcohol abuse and to help us improve our program by letting us know the attitudes that we are most in need of changing to begin to alter the deteriorating family cycle.

Distribute the myth and fact sheet. Briefly present the concept of the myriad myths which surround alcohol abuse and the role of perpetuating the problem that these myths play. Explain that the myths on the sheet are some of the most common and most serious that serve to reinforce the problem. Parallel the information on this sheet to the prequestionnaire.

Pass out the illness of denial handout and go through it thoroughly. Encourage minimal discussion, but maintain the focus on denial.

Distribute the two pamphlets and ask them to read them before the next meeting. Associate the material you have previously gone through to these pamphlets, explaining that much of what you have been talking about is very well explained and will be made more clear by reading them.

Set the next meeting and leave. Thank everyone for allowing you to meet them. Be gracious and courteous always.

SAMPLE

To be adapted to agency requirements

COTTAGE MEETING II

The materials that you will need to take with you are: The Postquestionnaire and the Related Dependencies handout.

Arrive at the home 5 minutes early and greet the hostess. Address each member of the group individually. Set the climate and share some of the experiences group members may have had regarding the drinking member since the last meeting.

Distribute the handout and go through it thoroughly. Relate much of the material to the Merry-Go-Round pamphlet that was distributed at the last meeting, explaining that the roles in the circle are very well explained in the pamphlet. Refer questions, where possible, to the pamphlets, encouraging rereading of them.

Distribute and administer the Postquestionnaire. Explain that it is the same questionnaire as the one given at the first meeting and will be used to determine the degree of attitude change that has taken place within the group regarding alcohol use and abuse.

This is the end of the second meeting. Explain that the Cottage Program consists of two specific meetings, but they are welcome, individually or as a group, to participate in the series again. Also, referral may be appropriate at this time, but consider it wisely before initiating.

Thank them all for their time and invite them to the Cottage.

SAMPLE

To be adapted to agency requirements

STAFF REACTIONS TO VOLUNTEER PROGRAM[13]

This questionnaire is not just to make more paperwork for you. It's because we want your frank ideas on the improvement of our volunteer program.

1. How long have you had any sort of contact with the volunteer program?

2. How much time during an average week are you in any sort of contact with volunteers?

3. How do you see your main role in relation to volunteers? (direct supervisor; they work with records I also work with; they help with routine around the office, etc.) Please specify.

4. Could the agency use more volunteers now? Fewer volunteers? About the same number?

5. How could volunteers do their present jobs better?

6. What jobs, if any, could volunteers usefully perform that they don't now?

7. Could any jobs volunteers now perform probably be done better or more efficiently using paid staff?

8. What are some of the things you see as particularly helpful in the volunteer program?

9. What are some of the things that could be improved?

10. Any other comments you'd care to make would be most welcome.

SAMPLE

To be adapted to agency requirements

STAFF EVALUATION FORM[14]

In an attempt to encourage positive growth and change, we are asking you to take a few minutes of your time and help us evaluate our volunteer program.

1. How do the volunteer program objectives fit in with your perception of the agency's program goals?

2. To what extent have these objectives been achieved?

3. What do you see as the strongest aspects of the volunteer program?

4. What do you see as the area most in need of change in the volunteer program?

5. In what areas would you like to see the volunteers have additional training and background?

6. In general, what are your reactions to the volunteers' performance and overall program?

7. How would you describe the clients' reactions to the volunteer program?

8. What additional comments would you care to make?

Unit____________ Date____________

SAMPLE

To be adapted to agency requirements

VOLUNTEER REACTIONS TO VOLUNTEER PROGRAM[15]

We need your help again—your ideas to help us improve our volunteer program.

1. How long have you been in the volunteer program?

2. Please describe briefly your volunteer job(s).

3. Where does your volunteer time go in an average month?
   ______ hours with client, or otherwise on the job
   ______ hours consulting with regular staff
   ______ hours in various volunteer meetings
   ______ hours filling out reports, paperwork (not part of job itself)

4. What are the main reasons you joined up as a volunteer?

5. What are some of the main satisfactions you're getting from your volunteer work now?

6. What are some of the main frustrations?

7. What do you see as some of the good things about the whole volunteer program now?

8. What do you see as some of the things that could be improved?

9. Please describe any suggestions you may have on useful new jobs volunteers might fill in this program.

10. Any other comments you'd care to make would be most welcome.

SAMPLE

To be adapted to agency requirements

VOLUNTEER EVALUATION FORM[16]

Please Sign and Return

1. What basic qualifications do you feel are necessary for a volunteer in your particular placement?

2. What kinds of things do you do best?

3. In which areas do you feel you need more skill and/or knowledge?

4. What changes in your attitudes or performance have taken place as you gain experience as a volunteer

5. What could the agency offer that would help you to learn to perform your job more effectively? (topics for workshops, discussion groups, individual learning).

6. How many clients have you worked with during the past year? ______________________________

   Approximately how much time was spent with each client? ______________________________

   Approximately how long was an average meeting with last client? ______________________________

7. How would you qualify these relationships for the client? (Successful, unsuccessful, in terms of client needs and program goals.)

8. How would you qualify these relationships (successful, unsuccessful) for yourself? (in terms of your individual and program goals)

9. What would you suggest in the way of changes, additions, or deletions in this evaluation procedure?

Name ______________________________

Placement ______________________________

Date ______________________________

SAMPLE

To be adapted to agency requirements

VOLUNTEER SELF-EVALUATION FORM[17]

PROGRAM ____________________

Confidential

1. As a volunteer, did you enjoy your assignment? Yes___ Generally___ No___

2. About how long did your assignment last? ____________________

3. Did the program demand a reasonable or unreasonable amount of your time? ____________________

____

4. About how much time per week did you spend? ____________________

5. Did you have good communication with:

Staff	Yes ___	Generally ___	No ___
Unit supervisor	Yes ___	Generally ___	No ___
Coordinator	Yes ___	Generally ___	No ___
Clients	Yes ___	Generally ___	No ___

6. If you needed assistance, was it given promptly?
Yes ___ Generally ___ No ___ Anything specific? ____________________

____

____

7. Do you think the program was too rigid? Yes ___ Generally ___ No ___
too loose? Yes ___ Generally ___ No ___

Please explain: ____________________

____

8. Did you benefit from the monthly meetings?

Any suggestions? ____________________

____

9. What was of most value to you? ______________________________

____

10. Do you wish to be reassigned? ______________________________

Program When?

11. Do you have any friends you would recommend as volunteers? ______________________________
If so, please list:

Signature ______________________________

Date ______________________________

SAMPLE

To be adapted to agency requirements

CLIENT REACTIONS[18]

We would like you to give us your ideas on how the volunteer program can be made better for all of us. Thanks a lot; we appreciate your help.

1. What are some of the things volunteers do that you find helpful?

2. What are some of the things volunteers do that you don't find helpful or would rather they didn't do?

3. Are there any additional things you would like to see volunteers doing?

4. Do you feel there are any ways you could help volunteers in their work?

5. Is there anything else you'd like to say about the volunteer program?

SAMPLE

To be adapted to agency requirements

COURT VOLUNTEER PROGRAM
ADMINISTRATIVE CHECKLIST[19]

Scorecard

Want to see how you're doing? Below are some representative questions to help you take the temperature of your program. Of course, not all questions are equally relevant to all courts, and you might even want to make up some of your own scoreboard questions.

Place two checks on each line if you're *sure* it's true for you ____
Place one check on each line if you're uncertain or it's only partly true ____
Leave the line blank if it's *not* true for your program ____

1. Spent at least 3 months planning our program, before it started, carefully consulting all relevant people ____
2. During this time, we looked into at least three national publications on subject ____
3. We have written volunteer job descriptions, at least two paragraphs long ____
4. Deliberately go out after the kind of people who can fill our volunteer jobs ____
5. At least half of our volunteers are personally and consistently involved working directly with probationers ____
6. Definite plans or efforts to involve new types of people as volunteers: minority, younger, older, poor, etc. ____
7. Before accepting volunteers, we use and study a volunteer background registration form ____
8. Each volunteer is interviewed at least once before acceptance ____
9. Each volunteer is interviewed at least twice by different people ____
10. At least half of the clients we think could benefit from volunteers have them ____
11. Require at least 5 hours' volunteer orientation before assignment ____
12. Judge and/or regular staff are closely involved in volunteer orientation ____
13. We have inservice training meetings monthly or more often ____
14. Films, tapes, slide shows, and/or role plays used for at least 25% of the total training time ____
15. Each new volunteer receives and keeps a written orientation manual ____
16. Systematic effort to orient staff to working with volunteers ____
17. We have at least two main alternative work roles for volunteers ____
18. We deliberately seek maximum compatibility of volunteer and probationer by asking and assessing both volunteer and probationer ____
19. In addition to intuition, we employ specific compatibility criteria such as home location, interests, sex, age, etc. ____
20. Volunteers sign or explicitly assent to a work contract of specific time commitment over a maximum period of at least 8 months ____
21. During past year, we have been forced to terminate at least one volunteer ____
22. We have a regular position of volunteer coordinator or director ____
23. He or she feels he has enough time to do the job adequately ____
24. Volunteer coordinator is suitably paid ____

25. Our volunteer coordinator has attended at least 3 days of training institute conferences, also has read at least 150 pages in this specific area, in the past year ____
26. Our volunteer coordinator has his office near other staff and is regularly invited to attend staff meetings ____
27. Not more than 40 volunteers for each direct supervisor of volunteers ____
28. Each volunteer has an I.D. card or lapel pin or other suitable identification ____
29. Certification and/or volunteer recognition meeting at least once a year ____
30. Regular or supervisory staff are also recognized for their leadership role in volunteer programs ____
31. Volunteers have a desk or other designated place to roost at court ____
32. Provision for good, experienced volunteers to move up in responsibility and status as volunteers, e.g., head volunteer, volunteer advisory board ____
33. At least one of our exvolunteers is now on regular paid staff ____
34. Of volunteers who complete training, at least two-thirds are with us at the end of a year (or their assigned hitch) ____
35. At least a third of our new volunteers are brought in by present volunteers ____
36. Within 5 minutes, we can tell you (a) exactly how many volunteers we have, and also (b) for any individual volunteer, current address, job, and assigned probationer, if any ____
37. Volunteers are required to report at least once a month by phone or by report form, and we enforce this ____
38. At least twice a year we systematically ask regular staff what they think of volunteer programs ____
39. Ditto, both volunteers and probationers, what they think ____
40. Generally, volunteers are actively involved (e.g., advisory board) in decisions regarding their own volunteer program ____
41. We have a regular statistical-evaluative component supervised by a professional in the area ____
42. We prepare a regular, carefully considered budget for the volunteer program ____
43. We keep good account books and formal records on the program ____
44. At least one-half of our volunteer program funding is from local sources ____
45. At least one-half funding is incorporated in regular State or local probation parole budget ____
46. We have a newsletter for our volunteers, monthly or bimonthly ____
47. Main (or only) local newspaper has at least three favorable articles or editorials on volunteer program, each year ____
48. At least one of those is not deliberately requested by us ____
49. Regular staff invited to talk on program at least 10 times a year ____
50. Both police and welfare agency have expressed approval of our volunteer program ____

SCORING YOURSELF: JUST COUNT THE CHECKS

Total Volunteer Program Score

Roughly:

0-25, you have a long way to go, as you probably know
25-50, you still have a way to go
50-75, about average, maybe a little above
75-100, good for you, but keep the excelsior spirit!

Notes: Naturally, newer programs don't have as much chance for high scores; it takes several years to reach anywhere near your full potential, so why not score yourself again in 6 months or a year to assess progress?

SOURCES FOR SAMPLE DOCUMENTS

Sample documents have been used with the permission of the following sources:

1. Montgomery County Mental Health Association, Inc., 10920 Connecticut Avenue, Kensington, Md. 20795. From material developed for use in their volunteer service program.
2. Bashant, Susan K., *Volunteer Program Development Manual.* Denver: State of Colorado Judicial Department, Volunteer Services Coordination Project, 1973. Appendix B.
3. Montgomery County Mental Health Association, Inc., 10920 Connecticut Avenue, Kensington, Md. 20790. From material developed for use in their volunteer service program.
4. Bashant, Susan K., *op. cit.*, pp. 5 and 6.
5. Anoka State Hospital, Anoka, Minn. Handbook developed for use in their volunteer service program.
6. Montgomery County Mental Health Association, Inc., 10920 Connecticut Avenue, Kensington, Md. 20795. From material developed for use in their volunteer service program.
7. *Ibid.*
8. *Ibid.*
9. *Ibid.*
10. National Center for Voluntary Action. *Helping the Volunteer Get Started: The Role of the Volunteer Center.* Washington, D.C.: National Center for Voluntary Action, September 1972. Material adapted from chapter 6.
11. Scheier, Ivan H., and Judith Lake Berry. *Serving Youth As Volunteers.* Boulder, Colo.: National Information Center on Volunteerism, Inc., 1972.
12. Cottage Program literature used with permission of Bernie Boswell and Sandy Wright, 736 S. Fifth Street, Salt Lake City, Utah 84115.
13. Montgomery County Mental Health Association, Inc., 10920 Connecticut Avenue, Kensington, Md. 20795.
14. *Ibid.*
15. *Ibid.*
16. *Ibid.*
17. *Ibid.*
18. *Ibid.*
19. Court Volunteer Program, National Information Center of Volunteers in Courts, P.O. Box 2150, Boulder, Colo. 80302.

Sample Documents Related to Section IV: Implementation Phase

SAMPLE

To be adapted to agency requirements

STAFF SUPERVISION TRAINING DESIGN

The following is an example of a training design for staff supervision of volunteers.

Needs Assessment

Paid staff have been of vital importance to the operation of client services, but through the years, experience has shown that paid staff often lack the specialized training to deal with (a) resources and referrals, (b) in-office resources (conference call, professional backup, manuals, files, and so on), (c) identifiable techniques in working with volunteers, (d) volunteers in crisis (intervention/confrontation), (e) leadership versus directorship, (f) providing constructive positive and negative feedback, and (g) how to mandate personal anger and pressure.

The above areas of need involve skill and knowledge training interventions. Therefore, the following is designed to meet the above concerns with appropriate training sessions.

Training Objectives

By the completion of training, participants will be able to:

a. List personal styles in managing volunteers as to their effectiveness or lack thereof.
b. State at least six reasons for persons volunteering for client service.
c. Identify motivational needs of volunteers.
d. Determine and intervene in the mishandling of a call by another phone aide.
e. State the purpose for such an intervention (personal and program).
f. List responsibilities while on duty as paid staff.
g. Effectively utilize techniques compatible with personal style in providing (and accepting) feedback to volunteers.
h. State the times when personal expression of anger, tension, and/or pressure would be useful to self and volunteers.
i. List rationale for recognizing paid staff feelings in dealing with volunteers.

Trainee Population Characteristics

Male and female, predominantly white, group of 12-20, all paid part-time, previous training and various experiences, been involved with program 6 months to 4 years, resistant to training, different rates of learning, learn best by experience, hostile to power, know each other, sensitive and fairly open.

Materials and Methodology

Newsprint (3 pads), felt pens, films, videotapes, audiotapes, projectors, monitors, tape decks, trainers, printed manuals, consultants, screens, facility, transportation to outside resources, minilecture, small group discussion.

SAMPLE

To be adapted to agency requirements

TRAINING DESIGN CONTENT AGENDA

Session I

- Small group discussion:
  - Definition of paid staff
  - Definition of volunteer
  - Staff attitudes toward volunteer
  - Volunteer attitudes toward staff
- Minilecture—Characteristics of volunteers
- Small group:
  - Interventions, personal style
  - Confrontation and counseling
  - Techniques for dealing with office problems

Session II

- Utilization of services analysis
- Site visits
- Site visit teams' reports on service

Session III

- Minilecture—Detachment with care message
  - Resources and referrals in the metropolitan area
  - Staff frustrations—sharing exercise

Session IV

- Evaluation

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